Twitter Thread by Sandeep Kulkarni

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Of all the 'macro indicators' out there, if i had to choose one to assess risk-reward for equity markets, it would the this ■

> Update: HY yield spread down more than 125 bps since then...\U0001f914 pic.twitter.com/SVrfqB8dMA
>
> — Harish Krishnan,CFA (@hktg13) August 19, 2022