

Years ago, a client shared she knew it was a bad day in the stock markets because she had a letter from me in her inbox. I do tend to communicate more during challenging investment environments, and we are certainly experiencing that now. The S&P 500, NASDAQ and Russell 2000 (small cap companies) are all in correction territory (down 10% or more) this morning. Expectations of a recession in 2025 have increased. Attached is James Ragan's analysis and the video version is here. [James Ragan 4.3.2025](#) As I have shared, stocks go up on stairs and down on escalators. The VIX, a measurement of stock market volatility has reached levels not seen since March 2020. Corrections are normal and necessary. Markets move on expectations, currently expecting global trade wars and a US recession. Conversely, markets typically rally before the news turns positive making market timing difficult if not impossible. We will continue to make certain our liquidity needs are in cash equivalents and stay the course. That said, our primary objective is that our clients sleep well at night. If you would like to have a detailed discussion of your investment strategy, please let us know and we will set up a time to meet.

Lyn Cameron

"The best ability is availability. When you work with and for the best people in the business and you love what you do, showing up every day is a joy, but more than that, it is a privilege." -Charlie Cameron

LYN CAMERON, CFP® | Senior Vice President, Financial Advisor, Portfolio Manager

lcameron@dadco.com | p: 503.863.5085 | f: 503.863.5095

CAMERON WEALTH PLANNING

222 SW Columbia Street, Suite 1400

Portland, OR 97201

360 SW Bond Street, Suite 300

Bend, OR 97702

www.cameronwealthplanning.com

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