Charlie often said, “Don’t let the old man in!” I have been thinking about that quite often lately. The pace of technological change, combined with new opportunities for accessing information and managing, well, life, seems to be moving at warp speed. I find it important to embrace the changes, recognize the pros and cons, and adapt. While not market related, I recently enjoyed a cycling trip along the Moselle River. The plan was to ride a traditional road bike, I was reticent to let go of that. Sammy, the young man getting bikes for us, suggested we try e-bikes. “You’re on vacation!” he said. We acquiesced. It was about 105 degrees on our first day. We averaged about 45 miles a day for 6 days. While the route was along the river, there were definitely hills involved. I’m not certain, but I think I shouted “THANK YOU SAMMY” at least 100 times over the course of a week. So grateful to embrace new (kind of) technology!

Davidson is embracing new opportunities as well. There will be an upgrade to our mobile app shortly. One area where technology is creating meaningful opportunities is estate planning. Davidson Trust Company can review existing plans and help illustrate, in plain English, how assets are intended to transfer under your current documents. Many clients find this process uncovers questions they hadn't considered and provides valuable information to discuss with their estate-planning attorney. Davidson is also able to keep your Trust Documents securely if clients would like. Please let us know if you would like a review of your estate plan and we can help coordinate the next step.

It’s hard to believe the first half of 2026 is over. In spite of early volatility tied to inflation, interest rates, oil prices, and geopolitical concerns, the first half of 2026 delivered solid market gains. Corporate earnings held up and enthusiasm around artificial intelligence continued to support growth stocks. CNBC reported the S&P 500 up more than 8%, Nasdaq Composite up 11.1%, and Russell 2000 (small caps) up more than 21%; Yahoo Finance/Koyfin reported Russell 2000 nearly 22%, S&P 500/Dow about 9%, and Nasdaq about 13%. [cnbctv18.com], [finance.yahoo.com] At the risk of repeating myself, staying the course, making shifts around the edges to ensure a “sleep at night” investment strategy, and ensuring liquidity needed for the next several years is appropriately invested continues to be a sound approach.

I attended a webinar last week where the commentator shared a K-P-O-P acronym: Keep Politics out of Portfolios. While elections often dominate headlines, history suggests that long-term market outcomes are driven more by earnings growth, interest rates, inflation, valuations, and the business cycle than by which party occupies the White House.

As always, if you have any questions or concerns, do not hesitate to contact us.

Lyn Cameron

LYN CAMERON, CFP® | **Senior Vice President, Financial Advisor, Portfolio Manager**
lcameron@dadco.com | p: 503.863.5085 (calls and texts) | f: 503.863.5095
CAMERON WEALTH PLANNING

www.cameronwealthplanning.com
Members of D.A. Davidson & Co.
DA Davidson CA Insurance License #0763476
CA Insurance License #4115534

“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

D|A|DAVIDSON