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Grimes Investment Quarterly – Q4 2025

Benjamin B. Wallace, CFA – Chief Market Strategist

The Grimes Investment Quarterly provides an overview of the market performance for Q4 2025. Equity and Fixed Income markets closed out a solid 2025 with a positive Q4'25. On the Equity front, while returns were positive, we have seen the unusually concentrated market continue, along with historically poor relative performance for "Quality" stocks. For Fixed Income, interest rates are at reasonable levels but even though the Federal Reserve anticipates additional rate cuts in 2026, the continued price boost from duration that would come from lower long-term rates could be harder to come by.

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