



Equity markets reached fresh highs last week on expectations of a U.S.-Iran de-escalation and a reopening of the Strait. That optimism was quickly tested as tensions resurfaced over the weekend.

Our CIO, **Manish Singh, CFA**, joined CNBC to discuss whether markets are pricing in a resolution too early, what this means for risk assets, and how investors should be thinking about positioning in a more uncertain geopolitical backdrop.

[Watch the Interview on CNBC](#)