



New Normal, New Opportunities series

A special report by the Portfolio Advisory Group

Entire series

RBC Wealth Management's Portfolio Advisory Group presents the "New normal, new opportunities" series, examining secular trends in a post-COVID-19 world. The series will cover a range of themes that are emerging as a result of social distancing, the work-from-home imperative, health care developments, corporate implications, and broader societal change. The Portfolio Advisory Group believes identifying these trends and understanding their investment implications will be critical to navigating the road ahead.

Dear clients,

We hope that you and your families are safe and well, and that you were able to enjoy the sunny and warm weather this summer.

For those of you in our discretionary program, we have been sending portfolio-specific articles from the attached document over the past couple of months to help clients get a sense of some of the ongoing investment themes that guide our decisions.

RBC has now issued the full “New normal, new opportunities” series in one easy to read PDF, which we would like to share with you.

This series of articles goes over many different trends that are expected to emerge out of the “post-COVID” world. Some of these trends were already underway prior to the outbreak, but have become much more prevalent in recent months, and should continue for some time.

Some of the topics discussed in this article include the following:

- Work-from home (e-commerce; cloud computing; 5G)
- Corporate implications (cybersecurity; automation)
- Health care (drug discovery and diagnostics; telemedicine)
- Societal themes (globalization; government debt)

We hope you find this interesting, as we think it provides a lot of insight into how our world could look moving forward.

Best regards,

Ord Private Wealth Management
John, Tim, Liam & Kristen