What our trip to the US and Japan is telling us about the economy: Insights from the road

In the latest episode of Stocks Neat, Steve Johnson and Harvey Migotti discuss what they learned on their recent travels to the US and Japan.

Their trip started in Chicago at an industrials conference, which gave the pair a temperature check on what is happening in the US economy. Then, Steve and Harvey visited Tokyo to meet with a few companies undergoing transformational changes in the IT space.

"In that industrials space, I think there are some very helpful tailwinds going on in the economy. A lot of companies have been saying to us that [the US stimulus] has been helpful but it is not even yet at its full run rate"

Listen to the full episode to get their insights from their recent trip abroad.

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