

Webinar

Macro Risks and Market Opportunities for the Second Half of 2026

June 18th, 2026 | 1pm PT / 4pm ET

Register

The U.S. economy enters the second half of 2026 on strong footing, though risks around oil prices, inflation, labor markets, and geopolitical uncertainty remain elevated. At the same time, the automation revolution continues to support corporate profitability and productivity, creating a notable divergence between fundamental expectations and recent market action.

This session will explore the macro backdrop, the potential implications for earnings and economic growth, and where investors may find opportunities across secular themes, select cyclicals, and areas of the market that may be oversold.

Speakers



Scott Helfstein, Ph.D.

Head of Investment Strategy, Global X

Since joining Global X in 2022, Scott has led a team focused on investment opportunities, insights, and tailored solutions. Previously, Scott held senior investment and research roles at major financial institutions and public sector organizations, including Morgan Stanley, ProShares, and the Federal Reserve.

Scott holds a Joint Doctorate in Public Policy and Political Science from the University of Michigan, an MA in War Studies from King's College (London), and a BBA in Finance from The George Washington University.



Michael McCubbin

Regional Director, Global X

Michael leads client relations in the Pacific Northwest, working with Advisors on ETFs. He joined Global X in 2019 after roles in institutional services at Natixis and private wealth at UBS.

He has been active in CFA San Francisco, serving on MPAC and as Chair of the Young Leaders Council. He also volunteers for environmental and health-focused nonprofits. Michael holds a degree from the Haslam School of Business at the University of Tennessee.

