

REVIEW & PREVIEW

Review & Preview: Halftime

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Second Half Hustle

Half of 2026 is in the rearview mirror. So, what comes next? Hopefully more of the same.

The second quarter of this year was a sometimes volatile, but ultimately strong era for markets. Bolstered by double-digit earnings growth, Q2 was the best quarter for the S&P 500 since the second quarter of 2020, and the best [first half](#) of a year for the index since 2021. That's the good news, but the bad news is that once again, expectations have risen.