

Tuning out global noise: Why long-term investing still works

The Star

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February 2026 opened against a backdrop of relentless global noise. Political theatre, central bank transitions, breathless headlines about artificial intelligence (AI) and constant commentary on market valuations all compete for investors' attention. For investors with globally diversified portfolios, this environment can feel especially unsettling. Yet beneath the turbulent surface, the core principles of successful investing remain unchanged.

From renewed geopolitical posturing to the approaching end of Jerome Powell's tenure at the US Federal Reserve, markets are once again being asked to digest uncertainty. Add to this rising speculation about an 'AI bubble', concerns over capital expenditure by mega-cap technology companies, and questions around stretched valuations.

Against this backdrop, clients are asking us three consistent questions. First, will political and policy disruption derail global markets? Second, is it too late to benefit from structural trends like artificial intelligence without taking on excessive risk? And third, should portfolios be repositioned defensively until the noise subsides?

The starting point for these conversations is context. Markets have always operated amid uncertainty. History shows that periods of heightened anxiety rarely announce themselves as buying or selling opportunities in real time. Instead, they test investors' ability to remain disciplined. Knee-jerk reactions to headlines often come at the expense of long-term returns.

Diversification remains the most reliable antidote to global noise. By spreading exposure across asset classes, regions, currencies and investment styles, investors reduce reliance on any single outcome or narrative. While certain sectors will inevitably attract outsized attention, diversified portfolios are designed to participate in growth while cushioning the impact of unforeseen shocks.

Time in the market continues to matter more than timing the market. Missing even a handful of strong recovery days can materially affect long-term outcomes. For investors with long planning horizons, staying invested through volatile periods has historically delivered better results than attempting to step in and out based on sentiment.

This does not mean ignoring risk. Portfolio construction today demands selectivity and balance. Active management, through tactical asset allocation and regular manager reviews help ensure that exposure to high-growth themes such as AI is aligned with valuation discipline and overall investment objectives.

Importantly, wealth managers are using this moment to re-anchor clients to their personal plans. Market noise is temporary; having a goals-based approach to wealth management that addresses funding retirement, preserving intergenerational wealth, or supporting philanthropic ambitions will endure. Investment strategies are built to serve these goals, not short-term commentary.

As markets navigate the months ahead, the message to investors is clear. Global noise will come and go, but the principles of successful investing remain steadfast. By staying diversified, maintaining a long-term perspective and focusing on what can be controlled, investors can cut through the static and remain on course – even in the noisiest of times.

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