

Blog

INVEST IN ENERGY INFRASTRUCTURE. BE PART OF AMERICA'S ENERGY REVOLUTION.

America's midstream energy infrastructure, the pipelines that move U.S. energy supplies to market is crucial as we strive for American Energy Independence.

[ETF Mutual Fund](#)

Why We Still Prefer Equities over Bonds, Dollars over Euros and Devon Energy

December 18, 2011/[0 Comments](#)/in [Deep Value Equity](#), [Global Issues](#) /by [Simon Lack](#)

Barron's has a couple of interesting articles this weekend. They lead with "Buckle Up", and make the case for equities by highlighting the very wide equity risk premium (the S&P500 earnings yield of 8% minus the yield on ten-year treasuries of 2%) something we've also noted in the past. This spread is historically wide and, [...]

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Simon Lack2011-12-18 10:19:382011-12-18 10:19:38Why We Still Prefer Equities over Bonds, Dollars over Euros and Devon Energy

The Hedge Fund Mirage – In Print!

December 18, 2011/[0 Comments](#)/in [The Hedge Fund Mirage](#) /by [Simon Lack](#)

My book, The Hedge Fund Mirage, is finally in print and making its way up the Amazon Best Sellers list (currently in the top 3%). The hedge fund industry has co-operated in its launch by delivering the second worst year in history. Not all hedge funds are bad though, and since some of the most [...]

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2011-12-18 09:27:562011-12-18 09:27:56The Hedge Fund Mirage - In Print!

MLPs Offer Steady Income and Exposure to Shale Gas Development

December 16, 2011/[1 Comment](#)/in [Bonds Are Not Forever](#) /by [Simon Lack](#)

The New York Times today has a piece on Richard Kinder, founder of Kinder Morgan (KMP) the largest publicly traded partnership in the U.S. KMP recently agreed to acquire El Paso Corporation to create an entity controlling 80,000 miles of pipeline crisscrossing the U.S. KMP is a Master Limited Partnership (MLP), which is to say that owners of LP [...]

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2011-12-16 09:45:142011-12-16 09:45:14MLPs Offer Steady Income and Exposure to Shale Gas Development

Why We Should Borrow in € and Invest in Natural Gas

December 14, 2011/[2 Comments](#)/in [Deep Value Equity, Global Issues](#) /by [Simon Lack](#)

As the reality sets in of guiding 26 countries (i.e. the EU less Britain) towards agreement on a common set of revisions to the Treaty, the smug satisfaction of the tabloid press and at least a substantial minority of the British population is almost palpable even here on the U.S. side of the Atlantic. One by [...]

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The € is Becoming a Funding Currency

December 12, 2011/[0 Comments](#)/in [Deep Value Equity, Global Issues](#) /by [Simon Lack](#)

I spent a few days in London last week, meeting with investors and discussing my book. I also managed three separate TV appearances. I can tell you that if the € sovereign debt crisis appears to dominate the news in the U.S., it is an all-consuming obsession for the financial media in the UK. It [...]

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