

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](#)

Italy's in Play

November 10, 2011/[0 Comments](#)/in [Bonds Are Not Forever](#), [Global Issues](#) /by [Simon Lack](#)

At least Italian savers are offered a decent return on their money. 7% on ten-year debt is a bit more like it – at least after taxes and inflation you stand a chance of being ahead of the game, unlike in the U.S. where government policy is hostile to savers and seeks to inflict real losses [...]

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pg Simon Lack2011-11-10 09:39:292011-11-10 09:39:29Italy's in Play

Another Day, Another Euro Crisis

November 9, 2011/[0 Comments](#)/in [Bonds Are Not Forever](#) /by [Simon Lack](#)

Of the many ways in which Silvio Berlusconi thought he could

be forced from power, rising Italian bond yields was probably not high on his list. Even his titillating escapades seemed to have been insufficient to persuade the Italian electorate he should leave. But it turns out 7%+ bond yields, with €300Bn of new borrowing required in [...]

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Ohio Turns Left

November 9, 2011/[0 Comments](#)/in [Global Issues](#) /by [Simon Lack](#)

In yesterday's election the voters of Ohio rejected by 62% to 38% a state law that limited the ability of public sector workers to collectively bargain and to strike. It's a remarkable reflection of how Ohio voters feel about their government – I mean, who do state employees work for if not the people of [...]

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Less Silver More Gas

November 8, 2011/[0 Comments](#)/in [Deep Value Equity](#) /by [Simon Lack](#)

Yesterday we lightened up on some of our position in Coeur d'Alene (CDE). We've liked this silver mining company for quite some time – it's been trading at a substantial discount to the NAV of its mining assets and represents a good way to invest in bullion at a discount. Earlier this year there were

[...]

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Valuing Berkshire Hathaway

November 7, 2011/[0 Comments](#)/in [Deep Value Equity](#) /by [Simon Lack](#)

If you're into this kind of thing, which is to say that examining financial statements is a source of stimulating mental gymnastics, figuring out the value of Berkshire Hathaway (BRK) could keep you entertained. BRK released their third quarter's earnings over the weekend. It's an insurance company transforming itself into an operating business as Whitney [...]

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