

# 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 The Fed Believes The Yield Curve is Too Flat

March 9, 2012/[0 Comments](#)/in [Bonds Are Not Forever](#) /by [Simon Lack](#)

Eurodollar futures provide quite precise data about the market consensus forecast for interest rates. Since they extend out for ten years, they provide a rich set of information constantly updated about where market participants think 3 month Libor will be every three months. The FOMC recently started making public the interest rate forecasts of its members. They [...]

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Simon Lack2012-03-09 11:38:532012-03-09 11:38:53Why The Fed Believes The Yield Curve is Too Flat

# Presenting at 2012 Factset Symposium

March 9, 2012/[0 Comments](#)/in [Global Issues](#), [The Hedge Fund Mirage](#) /by [Simon Lack](#)

I'll be presenting on my book, The Hedge Fund Mirage, at the 2012 Factset Symposium Conference in Scottsdale, AZ March 19, and will be playing golf in Scottsdale over the weekend March 17-18.

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2012 Factset Symposium

# MLPs And The Growth Of Natural Gas Infrastructure

March 8, 2012/[0 Comments](#)/in [Global Issues](#) /by [Simon Lack](#)

We often write about companies involved in drilling for shale gas in the U.S. Their drilling success has depressed natural gas prices with little near term prospect of a bounce, and consequently we've focused on companies with low debt and cheap operating costs. Range Resources (RRC) Southwestern Energy (SWN), Devon Energy (DVN) and Comstock Resources [...]

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Growth Of Natural Gas Infrastructure

# Why Gold and Silver Miners are Attractive Today

February 29, 2012/[0 Comments](#)/in [Deep Value Equity](#) /by [Simon Lack](#)

We've never been big believers in owning gold and silver. Warren Buffett's comment (most recently in his 2011 letter released on Saturday) that all the gold in the world could be exchanged for "all U.S. cropland (400 million acres with output of about \$200 billion annually), plus 16 Exxon Mobils..." with \$1 trillion left over is [...]

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Simon Lack2012-02-29 11:38:192012-02-29 11:38:19Why Gold and Silver Miners are Attractive Today

# Ford's Novel Way of Paying Pensions

February 27, 2012/[0 Comments](#)/in [Global Issues](#), [The Hedge Fund Mirage](#) /by [Simon Lack](#)

Last week Ford (F) announced plans to shift their pension fund even more heavily towards bonds. At a time when interest rates are ruinously low and equities should appear attractively priced to a long-term investor such as a pension fund this represents quite a radical move. As recently as 2006 the company had targeted an [...]

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