

Blog

INFLATION PRESSURES ARE BUILDING. PROTECT YOURSELF.

The Federal government is pursuing seemingly unlimited spending and is enabling this with unsustainably low interest rates. Investors need strategies to preserve purchasing power and stay ahead of the stealth erosion of their savings.

ETF Energy Mutual Fund Inflation Mutual Fund

Savour the Moment

October 27, 2011/0 Comments/in Deep Value Equity, Global Issues /by Simon Lack

Sometimes you feel as if you'd like the world to stop right where it is. For most investors, arriving at work and checking their portfolios over coffee this morning should be one of the most pleasant beverages they've consumed in many months. After the misery of the third quarter culminating in September's testing of every [...]

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Simon Lack2011-10-27 08:50:452011-10-27 08:50:45Savour the Moment

The Quiet Buying of Shale Gas Assets

October 26, 2011/0 Comments/in Deep Value Equity /by Simon Lack

The FT notes in an article this morning how M&A activity in the shale gas arena reached almost \$50BN during the third quarter, a 135% jump on a year ago. Some deals were large and notable, such as Kinder Morgan's (KMP) purchase of El Paso. Others took place out of the spotlight, but what is clearly taking place [...]

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Simon Lack2011-10-26 08:41:042011-10-26 08:41:04The Quiet Buying of Shale Gas Assets

If you had more money than you knew what to do with...

October 25, 2011/0 Comments/in Bonds Are Not Forever, Global Issues /by Simon Lack

So says Don Sturm, owner of two community banks in Colorado. And Mr. Sturm's complaint is not that he's been amply paid (although he may have), but that depositors are flooding in at a rate that outstrips his banks' ability to usefully redeploy the money. This is QE2 at ground level. Investors fleeing the treacherous [...]

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Simon Lack2011-10-25 09:27:272011-10-25 09:27:27If you had more money than you knew what to do with...

Monday Morning Thoughts, October 24th

October 24, 2011/0 Comments/in Bonds Are Not Forever, Deep Value Equity, Global Issues /by Simon Lack

There's an interesting article in the Wall Street Journal highlighting that banks are increasingly the first source of funds for takeovers – providing more funds than the high yield bond market. Kinder Morgan's recent acquisition of El Paso is cited as an example, but there's increasing evidence that banks are increasing their risk appetite. The [...]

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Simon Lack2011-10-24 08:46:312011-10-24 08:46:31Monday Morning Thoughts, October 24th

Reining in the Rating Agencies

October 21, 2011/0 Comments/in Global Issues, Uncategorized /by Simon Lack

Through the ongoing and mind-numbing complexity of the European sovereign debt crisis, the bureaucrats in Brussels can be relied upon to introduce some absurdity into their deliberations. The latest is a report in the FT that under certain circumstances the EU will suspend the ability of rating agencies to evaluate sovereign credits. Now it's true that markets [...]

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Simon Lack2011-10-21 08:58:432011-10-21 08:58:43Reining in the Rating Agencies

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