

Blog

ETF Energy Mutual Fund Inflation Mutual Fund

Bond Buyers Drive with the Rear-View Mirror

November 16, 2011/0 Comments/in Bonds Are Not Forever, Uncategorized/by Simon Lack

Charles Evans, Federal Reserve Bank of Chicago President, was on CNBC yesterday and nicely illustrated why bond yields could stay low for a considerable time. At times sounding as if he was running in a Democratic primary campaign, Evans commented repeatedly on the pain out there in the economy and the chronic unemployment. Interestingly he maintains [...]

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Simon Lack2011-11-16 10:33:172011-11-16 10:33:17Bond Buyers Drive with the Rear-View Mirror

The Euro and Government Bonds Are Likely to be Poor Investments

November 15, 2011/0 Comments/in Bonds Are Not Forever, Global Issues/by Simon Lack

While the troubles in the Euro-zone have clearly been a major

source of uncertainty for U.S. equity investors, it's beginning to appear as if negative consequences will be largely imposed on Europeans with manageable fallout elsewhere. No doubt there's still plenty to worry about and this assessment could be wrong, but the economic data is [...]

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Government Bonds Are Likely to be Poor Investments

Get Elected and Legally Trade on Inside information

November 14, 2011/0 Comments/in Global Issues/by Simon Lack
60 Minutes ran a piece last night revealing that Congressmen are not only exempt from the insider trading laws that apply to everyone else but also routinely exploit inside information to which they have access. That's right, members of Congress can and frequently do profit from inside information, and it's perfectly legal. Further description hardly [...]

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Simon Lack2011-11-14 12:26:232011-11-14 12:26:23Get Elected
and Legally Trade on Inside information

The Euro Has No Good Options

November 14, 2011/0 Comments/in Global Issues/by Simon Lack
The challenges facing the Euro zone including most recently Italy seem so enormous and intractable that it's easy to contemplate previously unimaginable outcomes. Der Spiegel reports that the German government is preparing for a possible

Greek exit from the Euro. The currency was designed without an exit – it's unclear how Greece could extricate itself. A weekend [...]

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No Good Options

The FT on Not-So Hedged Funds

November 11, 2011/0 Comments/in The Hedge Fund Mirage/by Simon Lack

A friend brought my attention to a recent article in the FT by James MacKintosh in which he noted how hedge funds have increasingly been delivering returns that are correlated with the S&P500. It looks as if increasingly the search for alpha includes trying to time beta. The media isn't normally so negative on hedge [...]

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Page 186 of 193«<184185186187188>>