

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 Mutual Fund](#)

Profiting From The Efforts Of Climate Extremists

May 30, 2021/[1 Comment](#)/in [Midstream Energy Infrastructure](#) /by [Simon Lack](#)

Last week was hailed as a big victory for climate activists. In a 1-2-3 punch on Wednesday, a Dutch court ordered Royal Dutch Shell (RDS) to further reduce emissions from its products; Exxon Mobil (XOM) shareholders elected two new directors proposed by an activist hedge fund against management's recommendation; Chevron (CVX) shareholders approved a proposal to reduce emissions caused by its customers. All [...]

[Read more](#)

<https://sl-advisors.com/wp-content/uploads/2013/04/logo1.jpg> 0
0 Simon Lack

<https://sl-advisors.com/wp-content/uploads/2013/04/logo1.jpg>
Simon Lack2021-05-30 06:00:342021-05-29 10:19:32Profiting From
The Efforts Of Climate Extremists

Pipeline Investors Are Being Rewarded

May 27, 2021/[0 Comments](#)/in [Midstream Energy Infrastructure](#) /by [Simon Lack](#)

I spent the last couple of days visiting clients in central Florida, which is why this blog post is a day later than normal. The gradual return of in-person meetings is a welcome reminder that we're moving on from Covid. Floridians are happy with how their state handled the virus, often noting that business has [...]

[Read more](#)

<https://sl-advisors.com/wp-content/uploads/2013/04/logo1.jpg> 0
0 Simon Lack

<https://sl-advisors.com/wp-content/uploads/2013/04/logo1.jpg>
Simon Lack2021-05-27 06:00:492021-05-27 08:02:44Pipeline
Investors Are Being Rewarded

Pipelines Will Last Longer Than Equity Prices Imply

May 23, 2021/[2 Comments](#)/in [Midstream Energy Infrastructure](#) /by [Simon Lack](#)

An enduring dichotomy in the valuation of midstream energy infrastructure companies has been the sharply different outlooks implied by debt versus equity pricing. Dividend yields of 6-7% suggest equity investors don't regard their payouts as being sustainable indefinitely. Contrast that with investors in long term bonds, who accept yields of under 4% that can only [...]

[Read more](#)

<https://sl-advisors.com/wp-content/uploads/2013/04/logo1.jpg> 0
0 Simon Lack

<https://sl-advisors.com/wp-content/uploads/2013/04/logo1.jpg>
Simon Lack2021-05-23 06:00:522021-05-20 22:27:44Pipelines Will
Last Longer Than Equity Prices Imply

Pipelines Close In On A Milestone

May 19, 2021/[2 Comments](#)/in [Midstream Energy Infrastructure](#) /by [Simon Lack](#)

The S&P500 is up 11% so far this year. 2021 EPS estimates from Factset are up by close to the same amount. The rise in ten-year treasury yields means the Equity Risk Premium (ERP) doesn't show the market to be quite as cheap as it was, but not by much. Covid has been less traumatic [...]

[Read more](#)

<https://sl-advisors.com/wp-content/uploads/2013/04/logo1.jpg> 0
0 Simon Lack
<https://sl-advisors.com/wp-content/uploads/2013/04/logo1.jpg>
Simon Lack2021-05-19 06:00:592021-05-19 06:48:37Pipelines
Close In On A Milestone

Inflation – Back By Popular Demand

May 16, 2021/[0 Comments](#)/in [Midstream Energy Infrastructure](#) /by [Simon Lack](#)

Inflation is probably the biggest known risk facing equity markets today. Last week's CPI report was expected to be high and still exceeded expectations. The 4.2% year-on-year increase in the All Urban Consumers index (CPI-U) was boosted by comparisons with a year ago. The Fed, and many economists, have warned of the transitory base effects [...]

[Read more](#)

<https://sl-advisors.com/wp-content/uploads/2013/04/logo1.jpg> 0
0 Simon Lack
<https://sl-advisors.com/wp-content/uploads/2013/04/logo1.jpg>
Simon Lack2021-05-16 06:00:022021-05-16 14:28:31Inflation –
Back By Popular Demand
Page 2 of 166<[1234](#)>>