

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

Climate Extremists Are Losing By Winning

September 19, 2021/0 Comments/in Midstream Energy Infrastructure /by Simon Lack

For years environmental extremists have campaigned with increasing success for less investment in fossil fuels. The logic has been that as CO2-emitting sources of energy become harder to access and more expensive, the world would increasingly turn to renewables. Confronting demand for energy has generally been eschewed in favor of targeting suppliers. It's far easier [...]

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Extremists Are Losing By Winning

The Cool North Sea Breeze Lifting US Coal

September 15, 2021/0 Comments/in Midstream Energy Infrastructure /by Simon Lack

Anyone who's visited Felixstowe on England's windy east coast knows that umbrellas enjoy a brief existence in offering protection from the rain. Farther north off the coast of Scotland, the North Sea is one of earth's most hostile places to drill for oil. Gales are common. Working an oil rig isn't for the nervous. Consequently, [...]

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Simon Lack2021-09-15 06:00:452021-09-13 15:42:23The Cool North Sea Breeze Lifting US Coal

The Bull Market in Natural Gas

September 12, 2021/0 Comments/in Midstream Energy Infrastructure /by Simon Lack

Pipeline company earnings for 2021 were satisfyingly unremarkable, and were followed up recently with news of further givebacks to investors. Cheniere Energy implemented a dividend as part of a comprehensive long term capital allocation plan. They also plan to repay \$1BN of debt annually as they target an investment grade rating. The company expects to [...]

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Simon Lack2021-09-12 06:00:042021-10-03 16:33:23The Bull Market in Natural Gas

Climate Change: Prevention or Mitigation?

September 8, 2021/3 Comments/in Midstream Energy Infrastructure /by Simon Lack

Last week the northeast US suffered 52 deaths as Hurricane Ida (by then a tropical storm) dumped up to ten inches of rain in just a few hours. Cranford, NJ on the Rahway River is prone to flooding. It's a couple of miles from Westfield, GHQ for SL Advisors, and it seems like every decade [...]

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Simon Lack2021-09-08 06:00:152021-09-08 06:39:55Climate Change: Prevention or Mitigation?

A Pause On Spending?

September 5, 2021/1 Comment/in Bonds Are Not Forever /by Simon Lack

Democrat Senator Joe Manchin from West Virginia holds more sway than most over White House legislative strategy, because he's one of the few willing to break ranks with Democrat orthodoxy. In his WSJ Op-Ed last week, he argued for a "strategic pause" on Congressional spending. This means his support for the White House's proposed \$3.5TN [...]

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