

# Disclaimer

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# *InvestorsObserver* Workshop

# InvestorsObserver Workshop

- Charts
- What Else is Happening?
- Hot Right Now
- Member-driven content: Questions, site demonstrations, etc.
  - Can prepare slides for questions submitted ahead of time: Mention “workshop”

# S&P 500



S&P 500  
One Year

# NASDAQ



Nasdaq  
One Year

# Russell 2000



Russell 2000  
One Year

# S&P 500 vs. S&P 500 EW

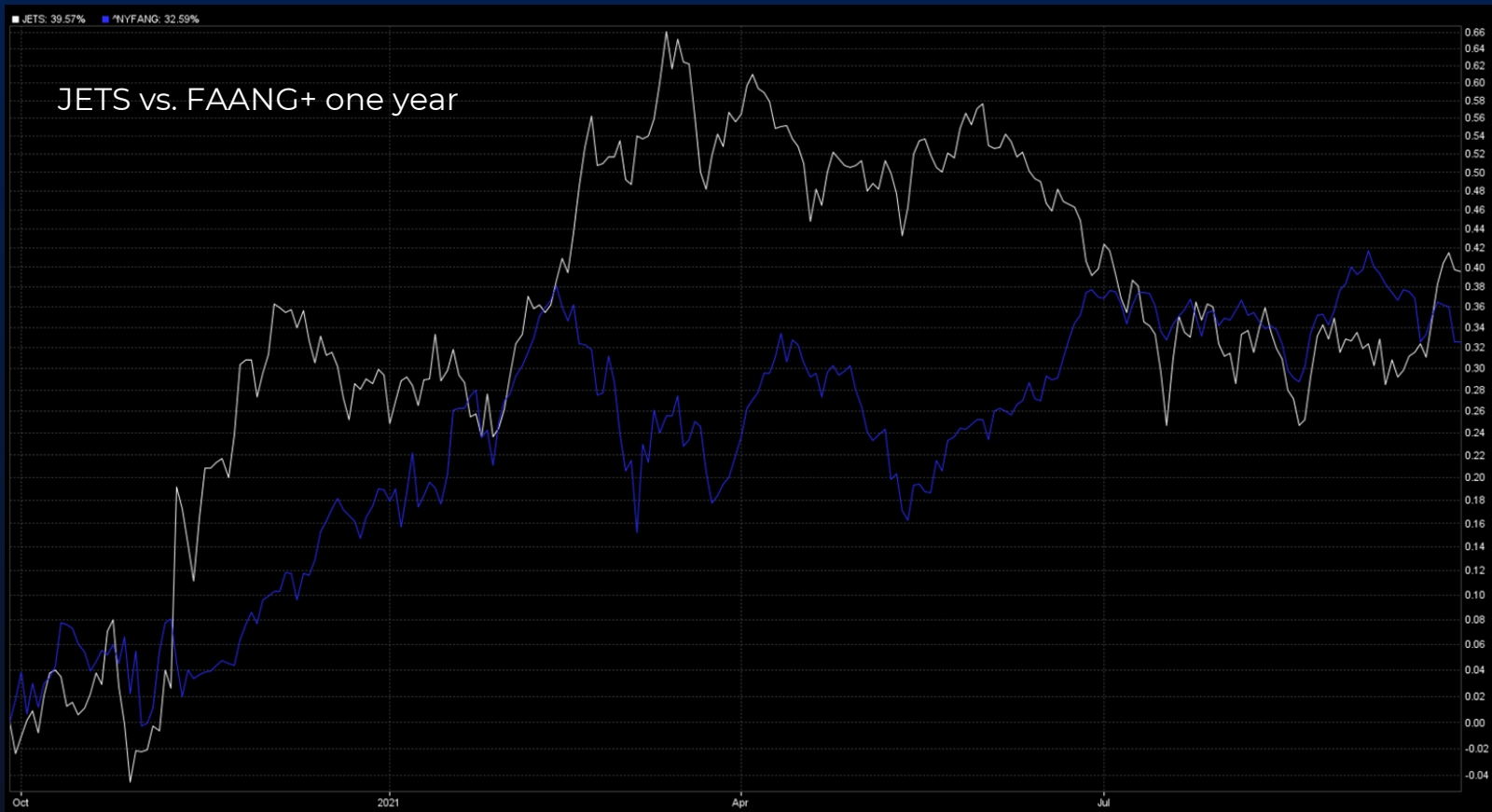


# Growth vs. Value





# JETS vs. FAANG+



# What Else is Going On?

- Federal Reserve, or really, guesses about what the Fed might do, driving markets
  - Everything is interest rates right now.
  - Market's responses to economic data is largely about what the Fed might do, not the actual news.
- Debt Ceiling and Government funding
  - Debt ceiling negotiations have the potential to cause some volatility
    - Big drop in 2011, the last time we did this.
  - Government shutdown typically not a big deal for stocks
  - Infrastructure, other Biden bills could help push stocks higher
    - Infrastructure and other spending finds it way to corporate coffers pretty quickly.
- Supply Chains and other shortages
  - High prices and shortages due to a lack of shipping
  - Problems in one area cause issues elsewhere. Processor shortage hurting demand for memory.
- Delta
  - Still out there. National numbers headed in the right direction, but still keeping a lid on things
    - No day where pandemic is "over"
    - May see additional ebbs and flows for some time
    - Hopefully no new Delta-like variants emerge

# Hot Right Now

- Real Estate
  - Still on top
  - Residential is the top performer
  - Industrial, a lot of which is things like warehouse space is second. This is likely due, at least in part to the shortage of shipping capacity
- Energy
  - Oil & Natural Gas prices have been rising.
  - Thermal Coal also on the rise... partially due to some shortages in China
- Financial Services
  - Asset Management... Interest rates
  - Financial Conglomerates
  - Banks - Diversified
- Industrials
  - Things related to shipping
- Consumer Cyclical
  - Clothes and shoes

# Questions?

*What is for you the best ETF to seat cash from now for a long time of 1 year or even more?*

*What is your opinion on QQQ and NUSI?-- Luca*

- This depends on your definition of “cash”
  - Do you want cash-like price stability?
  - Do you want growth?
  - Do you want *some* return without a lot of volatility?
- QQQ is the top 100 stocks in the Nasdaq
  - Typically bigger gains than an S&P 500 fund, but more volatile.
- NUSI

# Questions?

*On compare page...analysts compared INTC, NVDA and AAPL (H, SB and SB) but the sentiment page shows all negative/bearish except INTC (almost opposite) . Can I assume analysts are biased toward giving good press to what they cover. Sentiment covers just the "daily fly on the wall feelings" of the world. What credibilty should I give to both parameters. I compare sectors alot with the umbrella of "what people need" Well maybe GEN Z really needs tick tock?? But garbage is another need (WM) --*

● *March 11* These are two very different ways of looking at stocks

- Sentiment: Looks at last five days of trading
- Analysts: typically considering 12-months or more based in fundamental analysis
  - Typically analysts don't cover a lot of stocks they don't like for very long, but that's to suggest they're trying to pump their favorites, just that their job is to generate buy ideas, not to analyze every stock.
- INTC, NVDA and AAPL are three pretty different companies.
  - AAPL makes and sells devices to consumers, also has a large services business
  - NVDA primarily makes graphics processors used in high-end gaming and other machines as well at cryptocurrency mining
  - INTC primarily makes CPUs for PCs and chips used in data centers.