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Radio Show #2021-1, Podcasts # 25 & 26

OUTLINE:

1 message

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Radio Show #2021-1, Podcasts # 25 & 26 OUTLINE:

As of July 6 David, the avg vaccination rate in Trump counties was 35% compared to 46.7% in Biden counties.

SOURCE: <https://www.kff.org/policy-watch/the-red-blue-divide-in-covid-19-vaccination-rates-is-growing/>

Now I get it David; had Trump been re-elected, you KNOW that the situation would be reversed, especially after both President Good Joe and Commie Harris cast doubts on the vaccines while campaigning last year. You know that had Trump won, that nearly every media outlet in the nation would be running down every sore arm, every headache, every fever and every death related to the vaccines. I can just envision the tickers on the corners of MSNBC and CNN broadcasts showing rolling counts of every sort of malady caused by the vaccines.

BUT, I believe it is our patriotic duty and our individual gifts to humanity to get vaccinated.

As you know David, I was one of the first 15,000 or so people on the planet to get the Moderna vaccine. I read as much as I could find about the messenger RNA vaccines last spring. As a diabetic with

asthma, and as a self-styled patriotic American, I contacted Moderna early last July to volunteer for their clinical trial, and they directed me to the Lynn Institute in Colorado last August. I talked my wife Lori into driving down with me, and she also joined the trial. As it turned out, I got the good stuff while Lori got the placebo.

WARREN BUFFET IS A NET SELLER:

“Warren Buffett remained a net seller of stocks and slowed the pace of share repurchases in the second quarter, even as the overall market continues to march higher.

On Saturday, his holding company released its Q2 report, which revealed net stock sales of \$1.1 billion. While that's down from \$3.9 billion in Q1, it marks the third straight quarter of net selling in stocks.

A regulatory filing later in August will detail Q2 buys and sells.

Still, the value of his overall stock portfolio in his holding co. swelled 8.7% to \$293.8 billion by the end of Q2 from \$270.4 billion in Q1, as the S&P 500 and Nasdaq hit fresh highs to close out the quarter.”

SOURCE: <https://www.investors.com/news/warren-buffett-berkshire-hathaway-earnings-q2-2021-brkb-stock-buybacks/>

Now David, what does it mean to you that one of the great stock pickers of all time has been selling stocks all year long?

Could it have anything to do with the fact that as many as 56.78% of all U.S. stocks are trading below their 50 day moving avg?

Source: [https://www.barchart.com/stocks/quotes/\\$MMFI/technical-chart](https://www.barchart.com/stocks/quotes/$MMFI/technical-chart)

DEATH CROSS:

“The death cross is a technical chart pattern indicating the potential for a major sell-off. The death cross appears on a chart when a stock’s short-term moving average crosses below its long-term moving average. Typically, the most common moving averages used in this pattern are the 50-day and 200-day moving averages.”

Source: <https://www.investors.com/how-to-invest/investors-corner/when-to-sell-stocks-big-break-below-50-day-line-can-mark-end-of-a-huge-run/>

VALUATIONS:

Traders use the P/E ratio to check on the value of a stock. The current P/E ratio on the S&P 500 is 34.6:1, which means that for every dollar an avg company in the S&P 500 earns, that company is trading at \$34.6/sh. An avg company earns \$2, it is trading at \$69.20/sh.

SOURCE: <https://www.mutpl.com/s-p-500-pe-ratio>

Another way to look at it is that “the P/E ratio is a classic measure of any security's value, indicating how many years of profits (at the current rate) it takes to recoup an investment in the stock. The current S&P 500 10-year (not 1-yr)...but 10-year P/E Ratio is 38.1. This is 94% above the modern-era market average of 19.6, putting the current P/E 2.4 standard deviations above the modern-era average. This suggests that the market is Strongly Overvalued.”

SOURCE: <https://www.currentmarketvaluation.com/models/price-earnings.php>

So what does all of that mean? It means you...or your adviser needs to keep an eye on your portfolio. If you own stocks that are trading below their 50-day moving averages, you need to have a

chat with your financial adviser...or with yourself as to why you still own that company. Now I understand that some stocks simply cannot be sold as they might be up 500-1000%, making the tax burden in taxable accounts too large. There are ways to deal with that issue, and you can call me at 927-6400 to find out how.

HIGHLIGHTS AND LOWLIFES FROM THE OLYMPICS: DBACH>>>I NEED THE OLYMPIC THEME MUSIC.

As most of you know, my youngest daughter Sara was a top ranked downhill skier when she was in high school. After she went off to university, I worked race crews for about 10 years, and was the Chief Gate Judge for about 6 of those years. As a result of both experiences, I met numerous world class skiers, many of whom are still competing today. David and I were even lucky enough to interview Mikaela Schiffrin on KNFO when she was just 16 years old.

I have spent just enough time with Mikaela and her parents Jeff (may he rest in peace) and Eileen. Why do you suppose I am bringing up Mikaela and her parents? Because of what happened to Simone Biles. Eileen and Jeff sheltered Mikaela from all of the absolute craziness that swirls around world-class athletes. Eileen insisted that when Mikaela was young, that she should focus on training vs competing in little, non-consequential local races. Eileen travelled with Mikaela for years while she competed overseas. Mikaela always had someone to lean on who would protect her. In other words, her parents and friends and coaches never allowed her to be exploited.

Simone Biles is endorsed by Visa, Nike, Gap, Kellog's, Nabisco and Hershey...so far as I can tell. Each one of those sponsors require more than the occasional photo shoot for advertisements. They require the athlete to meet with customers of their brands at multiple parties and conventions. Each one of those appearances requires young Simone to stop her training schedule, hop on a

plane, meet and greet and otherwise make nice, then travel back to her training facility and try to pick-up on her training schedule and her routine. Additionally, NBC made young Simone the face of their advertising and the defacto visage of the olympics.

HIGHLIGHTS:

What was your favorite moment David?

- For me it was 27-yr old Molly Seidel sticking with the front runners in the women's marathon, eventually taking bronze, which was only the third medal ever for an American woman in the marathon.
- 17-year old Lydia Jacoby winning gold in the 100 m breaststroke was cool, and her hometown of Seward AL went nuts!
- Suni Lee taking Gold in the gymnastics all-around in Simone Biles' absence was AWESOME! Same for the women taking silver in the team event.

the 28-year-old from Katy, Texas, professed her love for her country. "It feels amazing," she said. "I love representing the U.S. I freaking love living there, I love it, and I'm so happy I get to represent U-S-A!" That was actually my most favorite moment.

Now for the lowlights and lowlifes:

- BRONZE medalist in Lowlife award: The Canadian women beating the toilet bugs on the U.S. women's soccer team was one of my favorite lowlights for lowlifes. UNIFORM: remaining the same in all cases and at all times; unchanging in form or character. The distinctive clothing worn by members of the same organization or body or by children attending certain schools. In other words, when you wear the uniform, leave your politics at home. Can you imagine what would have happened if an Iranian or Cuban or Chinese

athlete knelt during the playing of their national anthem? Right. As for the purple-haired Megan Rapino, who I believe is a lesbian, do you suppose she has any idea that homosexuality is illegal in 69 countries and punishable by death in 6 of those countries? The bronze medal for lowlifes goes to Megan Rapino.

Climate Change Doesn't Cause All Disasters: From Bjorn Lomborg:

- “A new study of more than 10,000 rivers around the world shows that most rivers now flood less. What used to be a 50-year flood in the 1970s happens every 152 years today, likely due to urbanization, flood-control measures, and changes in climate.
- Some rivers still flood, and reporters flock there, but more scare stories don't mean more global flooding. The river Ahr, where most of the German flood deaths occurred, had a spectacular flow on July 14, 2021, but it was lower than deadly flows in 1804 and 1910. The real cause of increased fatalities from riverine flooding in Germany and many other places is more people building settlements on flood plains, leaving the water no place to go. Instead of more solar panels and wind turbines to combat climate change, riverside communities need better water management. And foremost, they need a well-functioning warning system so they can evacuate before disaster strikes. Source:
https://www.wsj.com/articles/climate-change-natural-disasters-ahr-river-flood-germany-wildfire-risks-11628177742?mod=searchresults_pos1&page=1

CUBAN EQUALITY:

Some day I will disassemble the pack of lies that is the 1619 project, founded by Nikole Hannah-Jones, which is an attempt to completely

rewrite American history. For now, I want to briefly discuss another one of her lies when she stated that “Cuba has the least inequality between black and white people anyplace really in the hemisphere.” Tell that to a black Cuban.

The very partisan, far left fish wrap called the Washington Post stated in a recent article that “Black families (in Cuba) have experienced some of the deepest hardships as the island grapples with its worst economic decline since the collapse of the Soviet Union. They have less access to remittances than White families whose relatives have fled in greater numbers since Fidel Castro took power in 1959. And they are underrepresented in the more lucrative sectors of society, such as tourism.”

“It’s a powder keg about to explode when you have a regime that refuses to recognize that there are large, black communities with economic, housing, material and food deprivation,” said Guillermo “El Coco” Fariñas, a prominent Black dissident.

Facts RARELY support arguments from the left!

The Guns of August:

August is generally considered to be a quiet, boring month, but, according to Andy Kessler of the WSJ:

- PJ, did you know WW1 started in Aug of 1914?
- The formulation for the second Gulf War under W started in August of 2002.
- “On Aug 11, 1951, New York’s WCBS-TV broadcast the first baseball game in color, a double-header from Brooklyn’s Ebbets Field. The surprise was that television could do color at all—maybe

100 color sets existed at the time. Yes, “The Wizard of Oz” stunned theatergoers with color in August 1939. But television? Around 20% of U.S. homes had black-and-white TVs, often to watch Rocky Marciano’s almost monthly boxing matches. By 1960 almost 90% of homes had sets. As broadcasts in color ramped during the ’60s, color-TV sales boomed. Someone paying attention 70 years ago would have seen the future.” Kessler, WSJ

- “On Aug. 13, 1961, the world woke up to 32,000 troops in the Soviet sector of Berlin installing 97 miles of barbed wire and eventually building concrete fences—not to keep people out, but to keep anyone from leaving. The Berlin Wall stood for 28 years, as the icy Cold War proved that capitalism in the West, especially West Germany, completely outdistanced the stagnant communist Five Year Plans and neighbor turning in neighbor via East Germany’s Stasi secret police. The only question is why it took so long to implode.” Kessler, WSJ

<https://www.outkick.com/1619-project-founder-nikole-hannah-jones-thinks-cuba-is-most-equal-country-in-western-hemisphere/>

<https://www.washingtonpost.com/world/2021/07/19/cuba-protests-afro-cubans/>

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