

Thank God It's Friday!

February 13, 2009



Wall Street has had its share of horror shows over the past 18 months. With Friday the 13th looming many investors may be braced for more drama and goblins to come to light. Instead of feeding into the doom and gloom that surrounds Friday the 13th we choose to take a moment to salute thirteen investment themes we are NOT scared of:

- **Natural Gas** will come into its own as America's most plentiful natural resource.
- **Technology** will facilitate the changes that are coming and help rebuild and redefine how America does business.
- **Gold** will continue to attract frightened investors who have been spooked by current events. Gold is coveted because of its unique universal value.
- **Dividends** will be hiked by some and slashed by others but carefully analyzing cash flow will assure ours get hiked not slashed.
- **Municipal Bonds** continue as the shining star for investors seeking tax-free cash flow.
- Corporate Bonds will come back into vogue as investors seek real companies with real earning to return real interest to their investment portfolio.
- **Solar companies** will shine as more investors jump aboard the Obama Renewable Energy Express.
- **McDonalds Dollar Menu** The allure of McDonalds golden arches will continue as Americans stretch their dollars and ditch tablecloths in favor of chicken nuggets and seek Happy Meals for a quick pick-me-up.
- **Wind energy** will produce more electricity which may free up our fossil fuels for running our cars and factories.
- **Nuclear Energy** will get safer and safer as a long-term solution to renewable energy production.
- **Generic Drugs** will become more important than ever as health care costs rise but enhanced computer services will make drug prices more transparent.
- **Covered Calls** Writing covered calls will add growth to stock portfolios as premiums are collected and deposited which replicate an extra dividend enhancing total return in portfolios.
- **China** will recover from the world wide recession quicker and better than other nations thus re-establishing its power-house status.

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