



SMITH

Speaker With Global Perspective

DAVID L. SMITH

Economist, Futurist
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Author
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“FIVE AND DIME”

**5 Principles for Investment Success, 5 Stock Market Myths
Top 10 Signs of a Bull Market Peak and Bear Market Bottom**

PRESENTATION TOPICS

Profit and Peril in the 21st Century

Economic and Financial Outlook

U.S. Monetary and Fiscal Policy

The Asian Caper: Profit and Peril

The Contrarian Mindset

The “Third Oil Shock”

Principles for Investment Success

Cyclical Business Strategies

European Economic Outlook

Asian Economic Outlook

The Cassandra Chronicles

Objectives: Former security analyst and brokerage-firm president/CEO David L. Smith, author of the *Cyclical Investing* newsletter for the past 20 years, offers a wake-up call to the investment community, urging a return to basic investing principles that have often been obscured by "irrational exuberance" in recent years. He challenges his audience to reexamine their investment strategies and practices in order to achieve a prudent and profitable balance between risk and reward.

- **Have a healthy regard for risk:** examines the entire history of the stock market from 1789 to the present, quantifying the relationship between risk and return, revealing greater risk and lower return than is commonly perceived
- **Allocate Assets Dynamically:** reveals how to adjust portfolio asset mixes as an economic cycle unfolds so as to "surf the cycle," investing in asset classes that will be propelled upward by economy forces while avoiding asset classes likely to be depressed by those same forces.
- **Have an exit plan:** challenges the current conventional wisdom's "buy-and-hold" strategy, substituting instead "buy-and-sell" as the basis for profitable investing. Fundamental, technical, psychological and cyclical guidelines for profitable exit strategies are revealed.
- **Diversify, diversify, diversify:** reinforces modern portfolio theory's basic premise of enhancing return while reducing risk through genuine diversification beyond stocks
- **Develop contrarian mindset and emotions:** Replace the "buy-high-sell-low" consensus mindset and emotions that invariably miss the market turns with contrarian mindset and emotions yielding "buy-low-sell-high" results.

Mr. Smith will also reveal Five Stock Market Myths, and the Top 10 Signs of a Bull Market Peak and Bear Market Bottom.

Audience benefits: Learn to

- Avoid mistakes that could jeopardize financial well being.
- Recognize stock market peaks and troughs so as to capture profits and avoid loss.
- -Adopt dynamic, profitable asset allocation strategies by aligning portfolios with economic forces as the economic cycle progresses.
- Avoid surprises: gain early warning of major events, turn crises into opportunities
- Understand the current and forecasted economic and financial situation
- Position resources prudently to avoid losses and capture gains

Audience suitability: Investors, trustees, and investment professionals including asset managers, investment advisers, financial planners, stockbrokers, insurance agents.

Duration: 1 to 2 hours for keynotes, workshops and breakout sessions

Can be combined with other related presentations.