

Before the storm â>^

I don't know about you but this isn't exactly how I thought we'd be approaching the autumn. Be it the disturbing events in Afghanistan, a surge in the delta variant, worries about what the US Federal Reserve tightening, and a marked slowdown in China, there is a cocktail of negatives building in the global economy now and we and the markets are taking note. Does this presage a wider selloff going into the Autumn, or is it just a late summer squall, signifying nothing very much?

Being a sailor, I pay attention to the changes in conditions around me and I've decided that I'm trimming the sails and heading closer to shore in the event that things suddenly get tricky. The fact is, storms of life come - often quickly and unexpectedly, and while we can't stop the storms, we can do our best to prepare for and weather them until they pass. The optimum time to prepare is now, before the next storm hits, focusing on what we can control and the best route upward.

If you have any questions about our global investment strategy in light of recent events, let's chat. In the meantime, here are some articles we found interesting. Feel free to share with anyone you think might be interested. As always, I am available to talk, have a zoom call or meet for a coffee. Enjoy the rest of the summer and stay cool its hot out there!i»¿

Best Regards,
Geoff H.



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