Bull management pdf

Please note: The Bull is under new ownership and is now home to Gorgeous Brewery. One of the city’s best-kept secrets is that north London isn’t really London at all. Leafy, hilly and held together by a loose network of winding roads and LRB contributors, the air is crisper up here. The Bull, like many other pubs around Highgate, transports you to the countryside (dried hops dangling everywhere, butcher-block tables; Labradors on leashes). The approach to this dedicated ale pub is via hushed, tree-lined streets with little to no lamplight (the council obviously hasn’t learned its lesson about highwaymen yet), but because it’s on busy North Hill Road, the place has a hint of the city about it: with reassuring electric light still making its way in and keeping a waspy vibe at bay. An impressive 21 taps pouring cellar-chilled brews are perfect for exploratory sessions, with seasonal treats including a surprisingly nice peach and rosemary wheat pale ale, and a strong offering from the in-house London Brewery, including an oatmeal stout and an American wheat. Since you’re here you’ll probably end up eating something: there’s Sunday Roast, and midweek the fish and chips was sound – but a word of warning to stay away from the American-style grub (oversauced chicken wings, oversmoked burger) and stick to the best of British instead. Consistent with recent trends, the stock market's "dip" late last week was viewed as a buying opportunity Monday. Aided by short-covering from some participants and wariness of missing the boat among others, modest early gains accelerated as the session progressed, leaving major proxies significantly higher at day's end. The Dow Jones Industrial Average rose 2% to 8471.61 after trading as high as 8501.66. The S&P 500 gained 1.8% to 914.84 vs. its intraday best of 918.15, and the Nasdaq Composite climbed 1.9% to 1462.20 vs. its apex of 1465.40. Monday's gains recouped nearly all the ground lost last Thursday and Friday, although major averages failed to surpass last Wednesday's intraday highs of 8526.38 for the Dow, 919.70 for the S&P and 1468.08 for the Comp. Surpassing those levels on a closing basis is the market's next short-term technical challenge, one likely to be closely watched in the coming days. On Monday, however, there was mostly relief about the apparent stabilization of the SARS outbreak in many nations, excluding China, according to the World Health Organization. Similarly, North Korea's apparent offer to suspend its nuclear program, ballistic missile testing and missile exports, as reported by Sky News, further fueled bullish sentiment. Finally, crude futures fell another 4% and there was optimism in some circles about the $1.4 billion settlement between 10 Wall Street firms and securities industry regulators (more below). Elsewhere, better-than-expected earnings from Procter & Gamble (PG) and McDonald's (MCD) also spurred buyers. Perhaps more impressively, General Electric (GE) rose 1.4% despite an article in The Wall Street Journal that raised concerns about the firm's potential exposure to asbestos liability. GE's rally provided evidence of the market's underlying bullish tone. It also suggested computer-driven program-buying of baskets of large-cap stocks was a big factor in the advance on a day in which trading volume receded from recent levels. Almost 1.3 billion shares were exchanged on the Big Board vs. last week's average daily volume of 1.44 billion. Advancing stocks bested declining issues by 3 to 1. Things That Make You Go ... Hmmm As mentioned above, there are some who believe today's "historic" settlement between Wall Street and regulators will be bullish, as it will put a scandal-ridden era behind the industry. "Our unified action brings to a close a period during which the once-respected research profession became nearly unrecognizable to earlier generations of investors and analysts," Securities and Exchange Commission Chairman William Donaldson said in a press conference. (Italics added.) Donaldson didn't mean to imply that investigations into industry wrongdoing are over -- something New York Attorney General Eliot Spitzer made clear: "This is not the end -- this is very much the beginning," Spitzer said. In addition to potentially more regulatory scrutiny, Wall Street almost certainly faces more class-action lawsuits from investors who believe they were defrauded by the industry. Somewhat lost in the discussion is whether or not the deal will really restore confidence to the "average" investor. I, for one, am skeptical, judging by anecdotal evidence such as this email from a longtime reader: "After getting so burned I'm just so distrustful of the stock market. I ... read all those analyst reports and invested in WorldCom, Motorola (MOT) , AT&T (T) , etc. Believe me, the analyst reports only had great things to say when I bought these dogs." For the record, I agree folks like this are mainly looking for a scapegoat to rationalize their own ill-fated greed. Still, that doesn't change the reality of how Main Street is likely to view this deal. Having said that, sentiment is rising among retail investors. The American Institute of Individual Investors' sentiment poll had a big jump last week, as reported here. On Monday, UBS Warburg reported its investor sentiment poll had the highest one-month jump ever and to its highest level since June 2002, according to Economy.com. There remains great debate about at what juncture sentiment becomes a good contrarian indicator (assuming it does), but it's instructive to recall how poorly shares fared last June and July. On a separate but related note, some observers are musing about the coming seasonal weakness for shares, highlighted by the old saw "Sell in May and go away." From 1950 through 2002, the Dow posted cumulative losses of 361 points from May through October vs. gains of over 10,100 points from November through April, according to The Stock Traders Almanac. (Notably, Almanac publisher Jeffrey Hirsch cited this "Best Six Months" timing strategy in making a sell recommendation on April 11 -- prematurely, as it turned out.) Not coincidentally to the market's historically desultory performance from May to October, those months also happen to be the "dead zone" for mutual fund inflows, according to Alan Newman, editor of Longboat Global Advisors' Crosscurrents. Since 1984, 62% of all mutual fund inflows have incurred between November and April, with January and April alone responsible for 26.8% of all inflows, Newman reported Monday. In the bear market of 1966 to 1982 -- to which the newsletter writer compares the current environment -- monies invested solely in the May-to-October "dead zone" fell nearly 85% on an inflation-adjusted basis. "Consider that when the folks on Wall Street tell you to be invested all year round," he wrote. Then again, this settlement is going to markedly increase the public's faith in what Wall Street says, right?(More) Things That Make You Go ... HmmmThe economic expansion officially ended and recession began in March 2001, according to the National Bureau of Economic Research. Many quibble with the NEBR's work -- notably, the group hasn't yet officially determined an end date to the recession, despite consistent, albeit modest, GDP growth last year and in the first quarter of 2002 -- but it is the nation's official arbiter of recessions and recoveries. The salient point here is that 25 months after the recession officially began, the S&P 500 is down between 21% to 27%, depending upon when in March 2001 one starts measuring. In the nine prior recessions since World War II, "not once was the equity market off" this long after the start of a recession, according to John Lonski, senior economist at Moody's. The median change this long after those prior recessions began is a gain of 16%. Investors in those prior eras didn't have to deal with 9/11 and concerns about future terrorist attacks, as well as uncertainties leading up to war with Iraq. But investors in past recessions also didn't have to deal with the aftermath of the greatest equity bubble in American (some say world) history. The difference in stock market performance between past recessions and the most recent one "indicates how overvalued equities became during the previous boom," Lonski said. Just something else to contemplate as the market continues to produce bullish short-term signs, which inevitably lead to more "new bull market" chatter. Aaron L. Task writes daily for TheStreet.com. In keeping with TSC's editorial policy, he doesn't own or short individual stocks, although he owns stock in TheStreet.com. He also doesn't invest in hedge funds or other private investment partnerships. He invites you to send your feedback to Aaron L. Task. Sure you want to be contrarian. You want to buy into the negativity. You want to be the smart, smiling guy in the sea of gloom. I don't blame you. Makes sense. Maybe it even works a little. But there is one problem: supply. Right now secondary issuance this year is running 20% higher than all of last year in the Net sector. $27 billion! (Thanks Morgan Stanley Dean Witter for those numbers.) I am harping on this supply theme because supply is the enemy of the bull. It is what makes the bounces anemic. It is what makes the snapbacks lack snap. In all of the other downturns, we didn't have this much supply to absorb. It is unprecedented. Which means we won't snap back hard this time. Which means that strength must be sold for the wacky stuff with the supply problems, not bought. That's our plan. That's what we will be doing. Where is there no supply? Procter & Gamble (PG) . Bestfoods (BFO) . General Electric (GE) . You get the picture. James J. Cramer is manager of a hedge fund and co-founder of TheStreet.com. At time of publication, his fund was long General Electric, Bestfoods and Procter & Gamble. His fund often buys and sells securities that are the subject of his columns, both before and after the columns are published, and the positions that his fund takes may change at any time. Under no circumstances does the information in this column represent a recommendation to buy or sell stocks. Cramer's writings provide insights into the dynamics of money management and are not a solicitation for transactions. While he cannot provide investment advice or recommendations, he invites you to comment on his column at jjcletters@thestreet.com.

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