

Upcoming Chapter Meeting: AAI New York City



Date: Wednesday, June 5, 2013

Topic: The New “Nifty Fifty” and Continuation of the Rally

Speaker: Jason DeSera Trennert, Managing Partner, Strategas Research Partners

Jason Trennert will discuss how the decline of sovereign debt, including the downgrading of Treasury bonds, results in 27 companies that can now claim better credit risks than the U.S. This will lead to investors putting more money in a narrow list of companies. He views that the “great rotation,” predicted by many on the Street, is only in its infancy. Moreover, investors will tire of illiquid investments in private equity, also leading to the length and magnitude of the current rally being far greater than what a skeptical public expects.

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