

## What You Can Expect at the AAI Conference



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Those of you who regularly read my weekly commentary know that I attend conferences and other industry events. The presentations are generally informative, but it's the personal interaction that's the big draw for me. I've made numerous connections over the years, many I never would have made had I simply stayed in my office. Those connections aren't just with speakers, either—many have been with other attendees.

**MANY ATTENDEES  
ENJOY INTERACTING  
WITH THE  
SPEAKERS**



I bring this up because I want to talk to you about our forthcoming **AAI Investor Conference**. It's a great opportunity to learn from some of the smartest people in the industry. Not only will you be able to attend their presentations, but there will also be time for questions and answers afterward. In addition, you'll have ample time to meet your fellow individual investors between sessions, at the luncheon and during the two breakfasts.

Of course, the highlight of the conference will be the speakers themselves. We're excited to have University of Chicago professor Harold Pollack as our opening ceremony speaker and long-time *AAI Journal* contributor MarketWatch's Mark Hulbert as our luncheon keynote speaker. Many of you know Hulbert for his newsletter ratings and his appearances at past conferences; he always draws a big crowd. Pollack received a lot of positive attention from across the investment industry when he demonstrated how a portfolio strategy can fit on a single index card. I'm currently reading his book—"The Index Card: Why Personal Finance Doesn't Have to Be Complicated" (Portfolio, 2016)—and I think you'll enjoy his commonsense approach to investing and personal finance.

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## More on AAll.com

- [Solving the Problem of Retirement](#) - Paul Merriman's three actions investors can take to mitigate the potentially unlimited demands retirement places on finite savings.
  - [The Trinity Portfolio: Combining Diversification, Tilts and Trend-Following](#) - Mebane Faber discusses how investors can combine global exposure, value, momentum, buy-and-hold and trend-following into a single portfolio.
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## Highlights from this month's *AAll Journal*

- [Observations From Decades of Tracking Investment Newsletters](#) - We asked Mark Hulbert to share his observations from having spent decades tracking investment newsletters.
  - [The Individual Investor's Guide to Exchange-Traded Funds 2018](#) - This year's guide has been expanded, covering 542 ETFs in print and over 2,000 funds online.
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## AAll Sentiment Survey

Optimism rebounded to a seven-week high and is now even with its historical average. This week's special question asked members whether U.S. trade policy or Turkey is having a bigger influence on their sentiment. [More about this week's results.](#)

### **This week's results:**

- Bullish: 38.5%, up 2.3 points
- Neutral: 34.5%, down 0.3 points
- Bearish: 27.1%, down 2.0 points

### **Historical averages:**

- Bullish: 38.5%
- Neutral: 31.0%

- Bearish: 30.5%

Take the [Sentiment Survey](#).

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## What's Trending on AAI

1. [Observations From Decades of Tracking Investment Newsletters](#)
  2. [How Many Stocks Do You Need to Be Diversified?](#)
  3. [Diversifying Through Reinsurance and Marketplace Lending Interval Funds](#)
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## The Week Ahead

Just 12 S&P 500 index companies are scheduled to report next week as second-quarter earnings season comes to an end. Included in this group are Best Buy Co. Inc. (**BBY**) and Hewlett Packard Enterprise Co. (**HPE**) on Tuesday; Salesforce.com Inc. (**CRM**) on Wednesday; and both Dollar Tree Inc. (**DLTR**) and Dollar General Corp. (**DG**) on Thursday.

The week's first economic reports will be July international trade, the June Case-Shiller home price index and the Conference Board's August consumer confidence survey, all of which will be released Tuesday. Wednesday will feature the first revision to second-quarter GDP and July pending home sales. July personal income and spending will be released Thursday. Friday will feature the August Chicago Purchasing Managers' Index (PMI) and the University of Michigan's final August consumer sentiment survey.

The Treasury Department will auction off \$36 billion of two-year notes on Monday, \$37 billion of five-year notes on Tuesday and \$17 billion of two-year floating-rate notes (FRNs) and \$31 billion of seven-year notes on Wednesday.

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## Local Chapter Meetings

AAII Local Chapter Meetings offer you a variety of presentations from expert speakers who will give

you their view on the world of investing. A bonus of attending a Chapter Meeting near you is the opportunity to meet other AAI members who share your interest and enthusiasm for investing. You can even share the Chapter experience with your family and friends by inviting them to attend Chapter Meetings with you!

[Upcoming Meetings »](#)

More AAI Resources

**AAII 2018 INVESTOR CONFERENCE**  
**OCTOBER 26 – 28, 2018 • LAS VEGAS, NV**

**KEYNOTE SPEAKER**  
  
**Harold Pollack**  
*Author and Professor,  
University of Chicago*  
**“The Index Card Guide to Personal Finance”**

**KEYNOTE SPEAKER**  
  
**Mark Hulbert**  
*Hulbert Ratings LLC*  
**“Lessons Learned From Four Decades of Independently Tracking Investment Advisers' Performance”**

**PROFIT FROM ATTENDING 25 INVESTOR SEMINARS AND 30 WORKSHOPS!**

**Janet Bodnar**  
*Editor-at-Large, Kiplinger's*

**Wayne A. Thorp, CFA**  
*Senior Financial Analyst, AAI*

**Kevin Grogan**  
*Director of Investment Strategy,  
Buckingham Strategic Wealth*

**Craig Israelsen, Ph.D.**  
*Founder, 7Twelve Portfolio*

[View conference details »](#)