

BNN BLOOMBERG MARKET CALL

eResearch Corporation is pleased to provide two excerpts from Tuesday's BNN Bloomberg Market Call Newsletter.

Set out below are the respective Market Outlook commentaries from two leading investment analysts, plus Links to their respective 45-minute video interviews.

MARKET OUTLOOK

James Hodgins, President & Chief Investment Officer at Curvature Hedge Strategies

Focus: Market-Neutral Investing (Small and Mid-Cap Stocks)

We believe the "everything bubble" has finally burst.

By most cyclically adjusted valuation measures, equities and especially small caps are more highly valued than at any point in history. Further, the excessive risk-taking and increasing debt loads exacerbated by stock buy-backs has pierced the corporate bond bubble, with spreads recently widening at an historic pace.

In Canada, add in the hyper-negative economic policies from the federal government and the conditions are ripe for a continued bust.

VIDEO: James Hodgins' 45-Minute Video Interview <CTRL-CLICK> [HERE](#)

WEBSITE: <https://arrow-capital.com/curvature-market-neutral-fund>

<continued>

MARKET OUTLOOK

David Baskin, President of Baskin Wealth Management
Focus: North American Large Caps

A recent study shows that of 70 investible asset classes around the world, 63 or 90 per cent of them are currently showing losses year-to-date.

The Canadian market is among the losers and has been particularly discouraging for value investors. Usually reliable sectors such as banking, utilities, and telecommunications have been down and the recent sharp fall in energy stocks has only made things worse. We certainly understand the pull-back in highly valued technology stocks in the U.S.A., and we also understand the concern that higher interest rates will choke off growth and make bonds more attractive than stocks.

We think that the sale of both growth and value stocks has been overdone at this point and that, as a result, there is an opportunity to buy high-quality assets at attractive prices. History shows that money is made by those with the courage and wisdom to buy when markets are falling rather than rising.

VIDEO: David Baskin's 45-Minute Video Interview <CTRL-CLICK> [HERE](#)

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Bob Weir, CFA, Director of Research

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