

Jubak Picks

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The cure for the common portfolio

November 14, 2018

Jubak Picks Daily Newsletter

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Market Stumbles On Trade News

You might have expected that even the modest good news about crude in an oil market deep in the grasp of a bear would have pushed stocks higher. But not so.

The culprit seems to be the news on trade.

On the always interesting U.S.-China front in the global trade war, the last two days have revealed a yawning chasm in the White House between White House trade advisor (and ultra-China trade hawk) Peter Navarro and White House economic advisor (and the relative voice of reason) Larry Kudlow. The difference is pretty easy to sum up: Ahead of the meeting of Presidents Trump and Xi at the November 30-December 1 G20 conference in Buenos Aires, Navarro 's position seems to be "Talks bad." Kudlow, on the other hand, said yesterday "Talks good." It is by no means clear what negotiating position President Donald Trump will present at the meeting. But the China hawks in the administration are sticking to a list of demands that would require a reorganization of China's economic policy that is never going to be acceptable in Beijing.

And if you want more worrying trade news, Democratic Representative Bill Pascrell, likely to be the head of the Ways and Means Trade subcommittee when the Democrats take over the House of Representatives in January has said that the recently negotiated USMCA replacement for NAFTA needs "not only changes in the legislation but more enforcement" if the Trump administration wants votes from Democrats. The United States, Mexico, and Canada are scheduled to sign the agreement during the Group of 20 summit on November 30-December 1. But the trade deal will require approval from the new Congress in 2019

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BW: See "About the Author" on the next page.



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About the Author



Editor and Founder of JubakPicks.com; and Senior Markets Editor, MoneyShow.com

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BW: here is an excerpt from Jim's WELCOME message on his website

After twelve years with MSN Money, I am excited at being on my own. The move gives me a chance to bring you, my readers, more and better ideas for profitable investing. Each week the folks at the MoneyShow.com and MSN Money will publish seven of my posts from this blog on their sites. That is already an increase in your weekly dose of Jubak from the days when I wrote Jubak's Journal twice a week. But you will also find another 18 or so posts a week on my JubakPicks.com blog that do not appear on either of those two sites. (Although they have appeared as much as three days ago and as little as a few minutes ago, if they are really important) on my new subscription site at <http://jubakam.com/>)

Here I am aiming for five posts a day five days a week. I won't always get to those numbers. Some posts just take longer to research and write and sometimes, like everyone else, I run out of gas and need to take a break. But my goal isn't some arbitrary number of posts, anyway. The goal is to bring you the best market intelligence that I can on a schedule that keeps you at least one step ahead of the market.

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