

Mark Collinsworth

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To: Mark Collinsworth
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It's September!

The dreaded month of September is here and historically its not a good month for the markets. This September, we have trade war chatter, possible recession, its the end of the quarter (yes that's a thing), and a Fed meeting. Let's touch base on each of those.

Trade War:

This is not a big issue, unless US firms start firing people, which is unlikely at this point.

Possible Recession:

Don't jump on that bandwagon, yet. Yes, the economy is slowing, but there is not a lot of momentum behind it. So it is very possible the Fed can stop one from occurring if they act quickly.

End Of the Quarter:

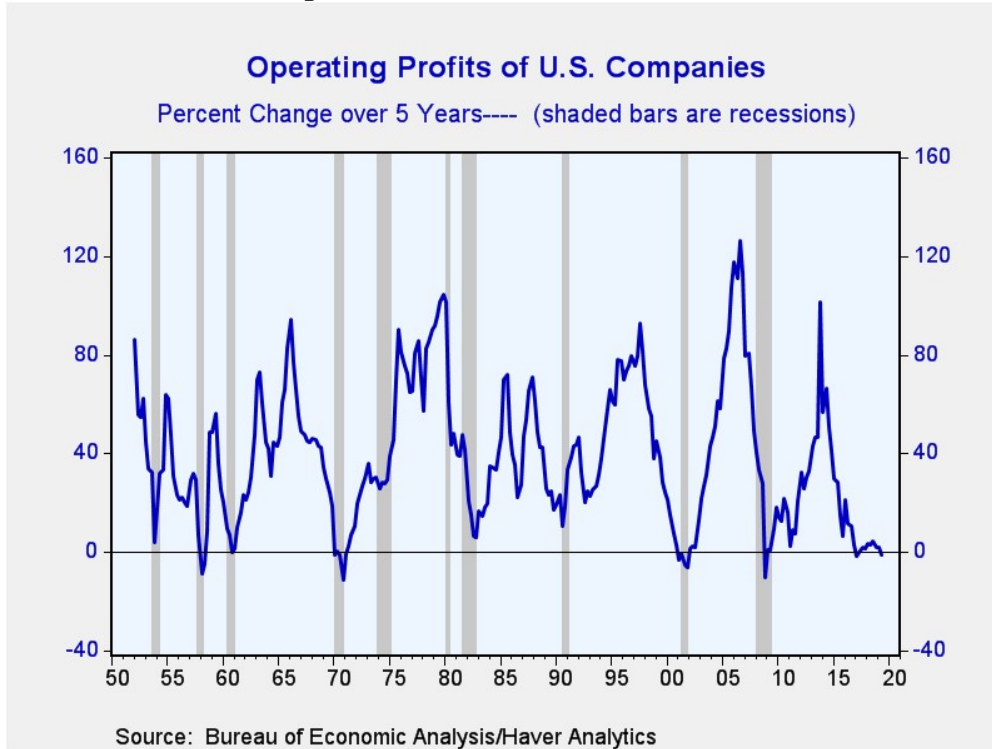
A lot of money managers will be "window dressing" their portfolios. That means they will be selling stuff that has done poorly and buy the stuff that has done good. This will create additional buys and sells, that automatically will cause volatility in the markets.

Fed Meeting:

That brings us back to the recession talk. Will they cut rates fast enough to stop a recession? We will find out later this month.

Speaking of Recession:

It does look like corporations are seeing their profits drop into the danger zone for a recession warning.



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