

No-Load Mutual Fund Selections & Timing Newsletter

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Dear Subscriber,

I will make the following lateral moves (selling one fund and buying another with roughly the same amount of capital) and buying one fund. The sells will both be long-term capital gains.

Aggressive Growth Portfolio

Sell all VILLX (about 11% of total portfolio).

Buy 2,200 shares (about 10% of total portfolio) FGBLX (Fidelity Global Balanced).

This is a transaction fee fund.

Sell all WEHIX (about 6% of total portfolio).

Buy 960 shares (about 10% of total portfolio) TMCGX (Turner Emerging Grth).

Buy 2,400 shares (about 5% of total portfolio) ALPHX (Hatteras Alpha Hedged).

Growth Portfolio

Sell all VILLX (about 10%).

Buy 3,850 shares (about 10%) FGBLX.

Sell all WEHIX (about 5%).

Buy 1,670 shares (about 10%) TMCGX.

Buy 4,100 shares (about 5%) ALPHX.

Balanced Portfolio

Sell all VILLX (about 10%).

Buy 3,250 shares (about 10%) FGBLX.

Sell all WEHIX (about 5%).

Buy 1,400 shares (about 10%) TMCGX.

Buy 3,500 shares (about 5%) ALPHX.

Income Portfolio
No changes.

TIMING

Bearish on stocks long-term and neutral intermediate-term.

Neutral on bonds.

Neutral on gold.

The stock market remains overvalued on a number of measures, but the trend has turned upward again. This is similar to 1999 into 2000.

Thank you,

Steve McKee
Editor