

**WHY THIS ELECTION WILL  
%\$@!&)%#! YOUR PORTFOLIO**

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**WHY THIS ELECTION YEAR IS TOUGH**

**LIES**

**DUELING NEGATIVITY**

**OVERANALYSIS**

**INFLEXIBILITY**

**NO-WIN ISSUES**

**YOUR OWN POLITICS**

## **ELECTION YEARS & WALL STREET**

**Election years since 1920 and here's how the Dow fared ...**

**1920 Wilson Dem -32.9%**  
**1924 Coolidge GOP +26.2%**  
**1928 Coolidge GOP +48.2%**  
**1932 Hoover GOP -23.1%**  
**1936 Roosevelt Dem +26.1%**  
**1940 Roosevelt Dem -12.7%**  
**1944 Roosevelt Dem +12.1%**  
**1948 Truman Dem -2.1%**  
**1952 Truman Dem +8.4%**  
**1956 Eisenhower GOP +2.3%**  
**1960 Eisenhower GOP -9.3%**  
**1964 Johnson Dem +14.6%**  
**1968 Johnson Dem +4.3%**  
**1972 Nixon GOP +14.6%**  
**1976 Ford GOP +17.9%**  
**1980 Carter Dem +14.9%**  
**1984 Reagan GOP -3.7%**  
**1988 Reagan GOP +11.9%**  
**1992 Bush Sr. GOP +4.2%**  
**1996 Clinton Dem +26.0%**  
**2000 Clinton Dem -6.2%**  
**2004 Bush GOP +3.2%**  
**2008 Bush GOP -33.8%**

**Election years up 67%; overall up 68%!**

**Election years: up 63% Democrat; 67% Republican!**

**Election years: Avg. Democrat +4.8%; GOP +4.9%!**

# **BULL OR BEAR?**

**12 questions to ponder for 2012!**

- 1. TOO NEGATIVE?**
- 2. WILL CONSUMERS CONTINUE TO SPEND?**
- 3. WILL BOSSES INVEST / HIRE?**
- 4. HAVE MY INVESTMENTS DONE WELL?**
- 5. INFLATION WORRIES?**
- 6. RATES TO RISE?**
- 7. BANKS TO LEND?**
- 8. EUROPE OVERBLOWN?**
- 9. TALKING RIGHT ISSUES?**
- 10. CORRECT TAX POLICY?**
- 11. ELECTION MAKE A DIFFERENCE?**
- 12. WILL '12 BE BETTER?**

## **SCORES**

**12-8 YES = BULL**

**0-4 YES = BEAR**

**7-5 YES = IN BETWEEN**

# **WHAT TO PONDER?**

## **BULL**

**Consumer-related stocks**

**Real estate / housing**

**Look overseas ... emerging markets**

**Borrow**

## **BEAR**

**Cash**

**Not Gold**

**Pay off debts**

## **IN BETWEEN**

**Balance**

**Broad approach, indexes**

**Junk bonds**