



ALPHA POINTE CAPITAL

Sold....now what?

This one hurts.

But it's a story I've heard so many times that I'm compelled to share it.

I've observed many market crashes and in some ways the Covid Crash was like most, as there are usually surprises and these surprises aren't always good, sometimes they are bad.

No, this story has less to do with the markets.

Unfortunately this story happened to be about how an investor got scared. She was so scared that after several months of historic volatility she finally gave in and sold all of her securities.

Yes it was in March.....

But it just so happens it was March of 2009, the market bottom of the Great Recession.

I did not know her then but I met her years later when we were networking at a Tech trade association event.

She was an exceptionally smart, CEO of a growing cyber company and well respected in the tech industry.

She told me her story and I asked if she found a way to get back into the markets. She said no, it was 5 years from the market bottom and she still hadn't found a way to get invested.

We decided to have a conversation the next day over coffee to talk more.

My approach was simple as I asked her how she had become such a successful leader with her business.

She felt a lot of her successes came from being disciplined, using data to help with decision making, and having a strong leadership team that helped keep everyone in check.

Interesting....

I told her that those same elements that helped her grow a successful business are usually what make for a successful portfolio such as sticking to your investment discipline even when the outlook is bleak.

While historical performance does not guarantee results what I've found is that history can be a guide to help with decision making. Charts and other tools aggregate data to help make clear decisions.

The last piece and I'll admit it is a bit self-serving but it is central to my professional existence.

I believe that I function best as being part of a client's "leadership" team to help make the soundest financial decisions. Also during times of intense volatile markets I can help keep my clients in "check" trying to avoid adverse actions that might setback a portfolio for years.

There are many parallels between successful life endeavors and how someone might approach their investment decision making, including running a business.

Take care,

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We accept appointments between 1-3pm EST Monday-Fridays * or suggest a more suitable time. Email Info@alphapointecap.com to reserve your 30 minute time slot today, indicate date, time, number, and the topic you'd like to discuss and we'll confirm your appointment.

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