# HIGHLIGHTS OF THIS ISSUE

In this issue, we briefly update our existing themes. We then present in the **Passive Aggressive Choice**, our spotlight piece, a brief introduction to ETFs and arguments regarding their suggested investment use.

- Over the summer, the market was reluctantly taken to near or actual new highs for the year in some asset classes and certainly off the lows for most. What now? Is this a September to remember in terms of accidents waiting to happen? We think this is rather a month to ignore, if needed, by focusing on the forest, not the trees.
- In our **PIGS vs. Bacon** theme, we alert the 'faithful' that the slaughtered pig is not a 'sure bet' anymore, or at least it would require greater effort to be argued as such.
- In our **Healing Touch** theme, there is further evidence that this sector offers a relative advantage to the investor.
- In our **Passive Aggressive Choice** spotlight piece, we argue about siding with the industry sector oligopolists as well as using ETFs either as a tactical or a strategic investment tool.




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GAD's word flash

issue 59 - 7 Sep. 2012

Eurobank