

# Hotspot

His Bark is worse than his bite, the advice to sit tight - was right!

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## His Bark is worse than his Bite, the advice to hold tight - was right!

We sometimes forget that stock market's performance is the result of investors looking forward, not as a result of looking at what the current situation is or looking back. Investment managers are looking at how a company's share price or the economy will look in the future. If the future looks secure and positive, then this will be reflected in the values of shares, and stock markets will rise. If the future looks bleak then the opposite will happen, markets will fall.

No matter what emergency or disaster that occurs to upset the world's stability, the stock-markets will be affected in some way or other and markets will fall. But it is always amazing that if all the good fundamentals are in place, good company earnings and profits, falling interest rates, positive outlook, then markets will shake off the problems and quickly recover.

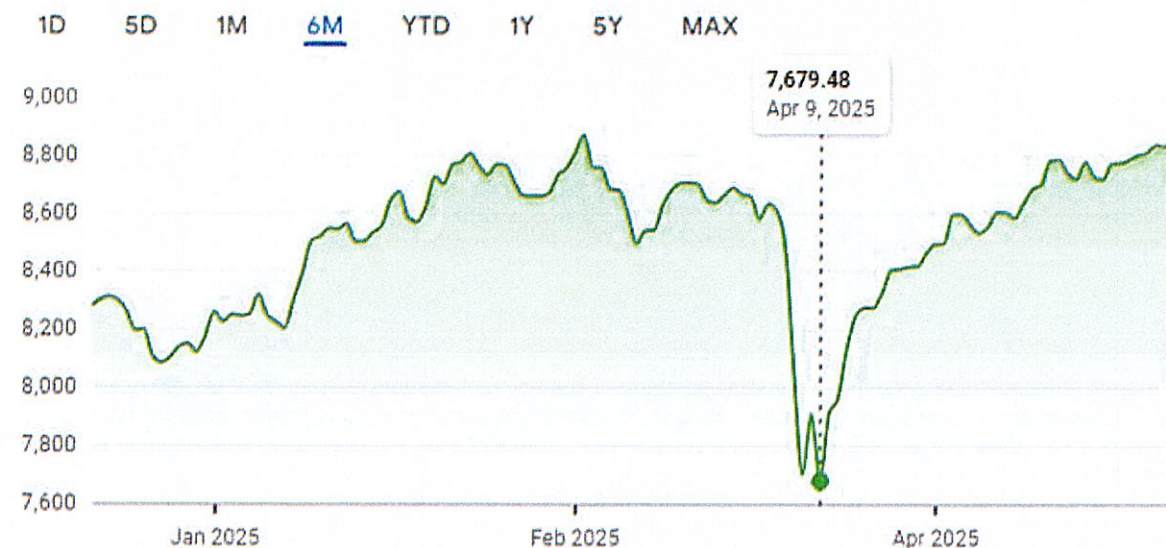
This is exactly what happened to the world stock markets resulting from the shock of the Trump Tariffs. For a few days the world was in shock, markets crashed 14% to 17% and investors started to look for safer investment havens, like cash or Bonds. Our advice to all our clients, was "hold tight" and looking back now from the current position that advice was right.

Below is the performance of the FT100 Index of the top 100 companies in the UK. Clearly you can see the fall in the index around the 9<sup>th</sup> April, being the lowest point in the index.

## FTSE 100 Index

**8,881.63** ↑ 7.26% +601.27 6M

Jun 10, 2:11:49 PM UTC+1 · INDEXFTSE · Disclaimer



After a couple of days, Mr Trump saw the reaction of the markets, took note of wiser advice, adjusted his tariffs, and the markets started to recover upwards. Since the shock tariff announcements, America has negotiated more reasonable Trade Agreements with some countries and the markets are continuing to recover.

Thankfully, the UK was one of the first countries to agree a new Trade Agreement, with more favourable tariffs than other countries which given the UK a more positive outlook for the future. As you can see a similar performance picture over the same period is starting to emerge with the stock markets of France (CAC40) and Germany in the DAX and Japan with the Nikkei.



## CAC 40

INDEXEURO: PX1

Market Summary > CAC 40

# 7,791.19

+396.41 (5.36%) ↑ past 6 months

10 Jun, 13:38 CEST • Disclaimer



## DAX PERFORMANCE-INDEX

INDEXDB: DAX

Market Summary > DAX PERFORMANCE-INDEX

# 24,098.39

+3,769.23 (18.54%) ↑ past 6 months

10 Jun, 13:39 CEST • Disclaimer



## Nikkei 225

INDEXNIKKEI: NI225 ;

Market Summary &gt; Nikkei 225

# 38,211.51

**-1,156.07 (-2.94%) ↓ past 6 months**

10 Jun, 15:45 GMT+9 • Disclaimer



So, what of the future? Mr Trump appears to have calmed down, changed his mind here and there and all stock markets see more stability ahead and continue to move higher. Europe and the Far East has firmly, across the board, accepted they must look after their own security and spend more and more on defence. Not only nationally but also collectively and this means UK and European defence companies will expand and become more valuable and help to push up stock market performance.

Enjoy the sunshine!

Best regards

Ray

**[Seven ways the Spending Review will affect you](#)**

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