

Hotspot

Blah, blah, blah. Up, down, up.



INVESTMENTS

MORTGAGES

PENSIONS

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PROTECTION

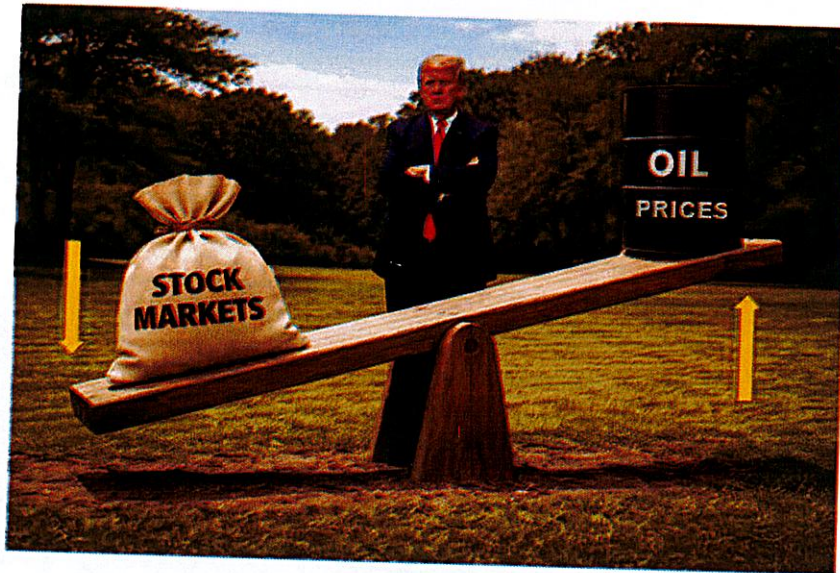
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Blah. Blah. Blah. Up, Down, Up!

The International stock markets are being seriously affected with a new factor besides the usual economic indicators and influences. The news conferences of Mr Trump and what he says and sometimes what he doesn't say.



His speeches and what he implies are having a considerable effect on the price of oil which is having direct effect on the world's stock markets. Giving a tight deadline to Iran makes for an upward price of oil which results in a fall in stock markets, giving a reasonable deadline, has the opposite effect.



There is no question now that the Strait of Hormuz is the critical path to the outcome of this conflict. As I pointed out in my previous blogs, the grip that Iran has on the safe passage of shipping through the Hormuz Strait is having the most severe consequences to the world's economy. The war will not be completely settled until Shipping companies and Captains can sail through the Strait in safety. Until that is achieved, the price of oil will remain high and stock markets with remain affected.



Notwithstanding, all the the International stock markets are standing up well the to the pressure. The FT100 is still only down around **10%** since the start of the conflict and this has to be compared with the **22%** increase over the last 12 months.

The European markets are down only around **8%** compared with a much lower increase over the last 12 month.



and the Japanese markets are slightly down... compared to an increase of over **42%** over the past 12 months.

However, the American S&P500 is only down **5%** since the start of the conflict. The reason

for such a small drop in the US market is that the fall has been offset by the continued rise in the stock prices of the Magnificent 7, such as Nvidia, Microsoft, Meta and Amazon. These companies do not rely on oil for their operations.



Our view remains to sit tight and weather the storm. Markets will return to growth.

HAVE A GOOD WEEK

RAY

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