



ELECTION 2020: AMERICAN CIVIL WAR

Agenda

- Polls
- Platforms
- Black Swans
- Outcomes
- Markets
- Investment Outlook



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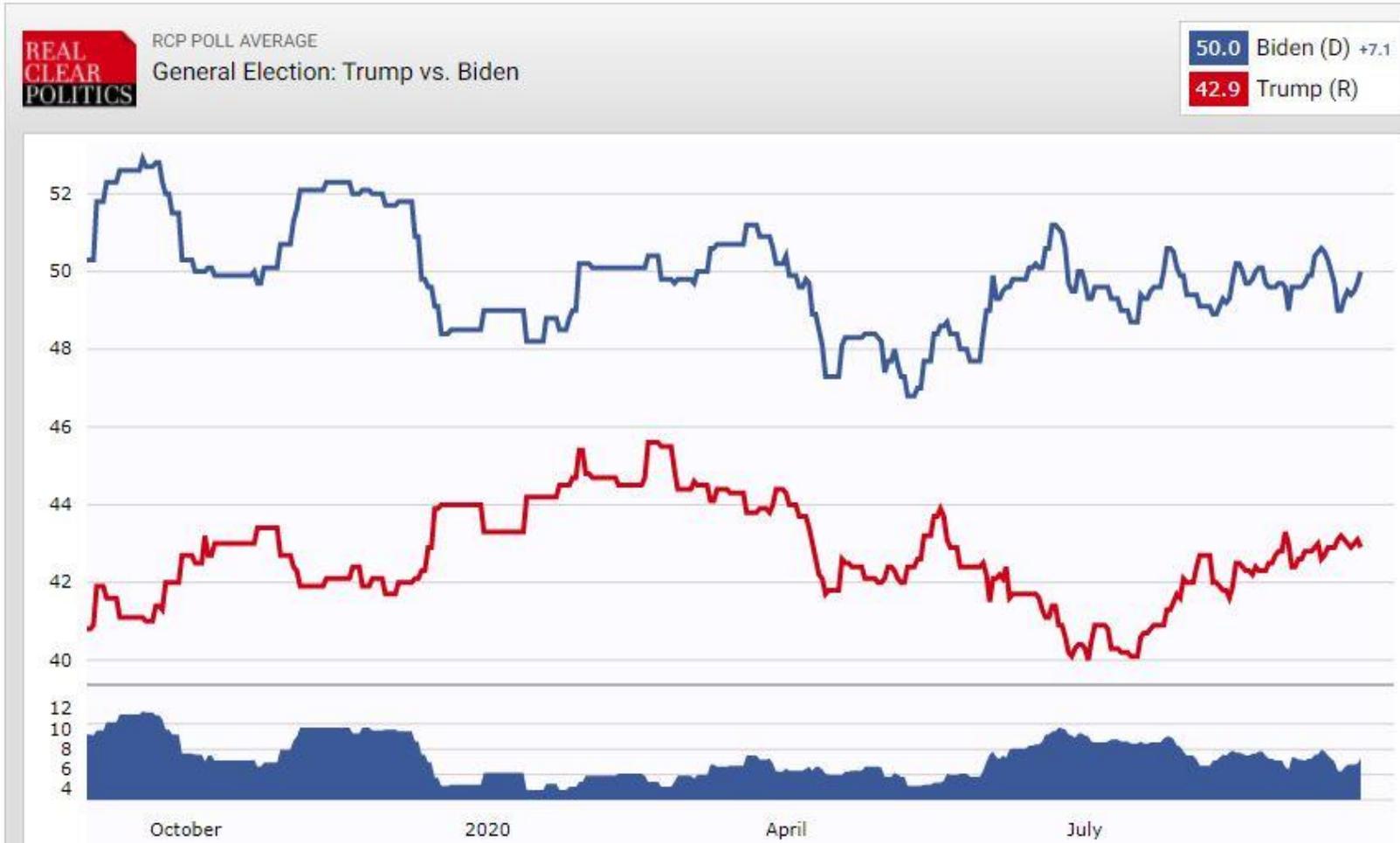
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Polls:

Biden ahead



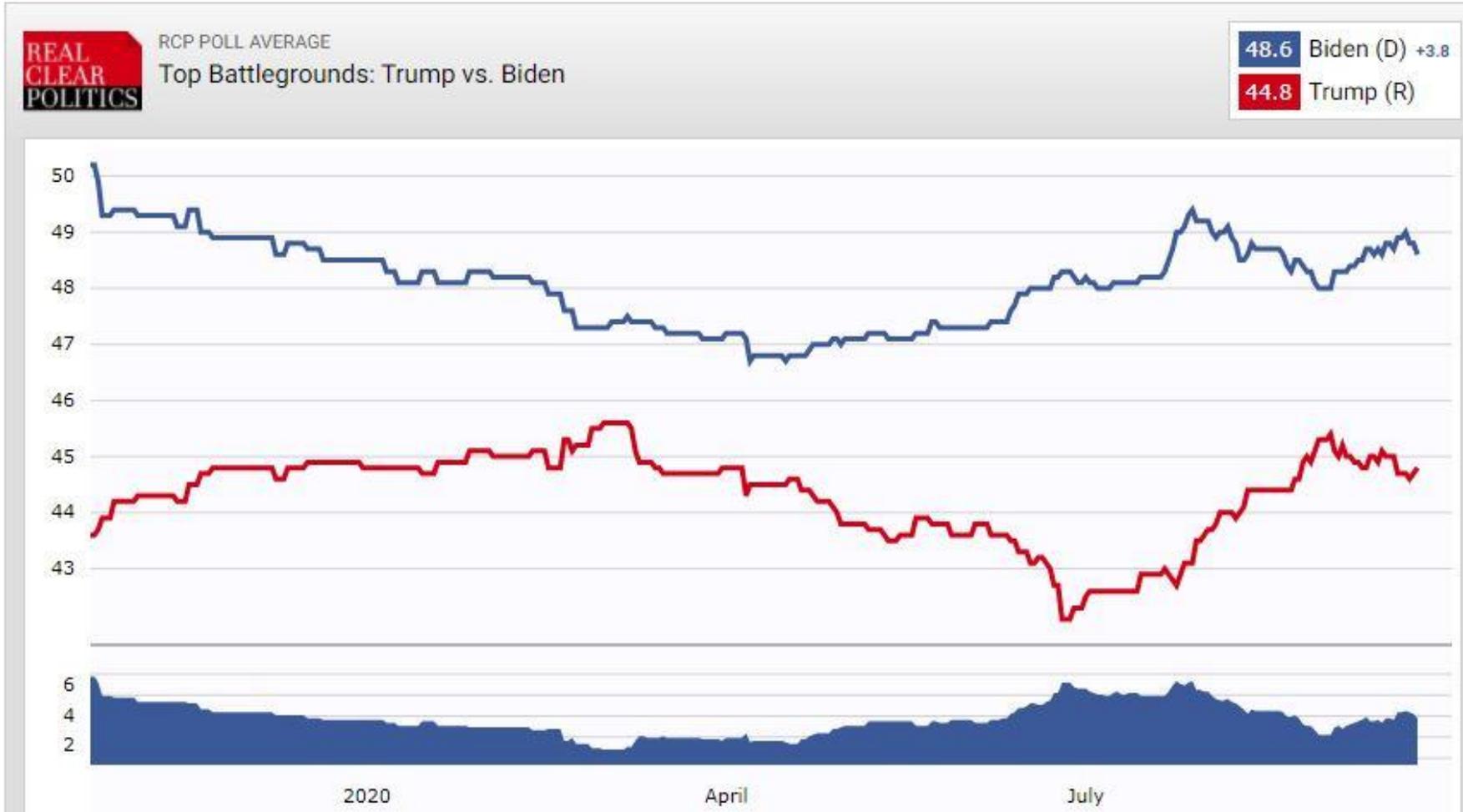
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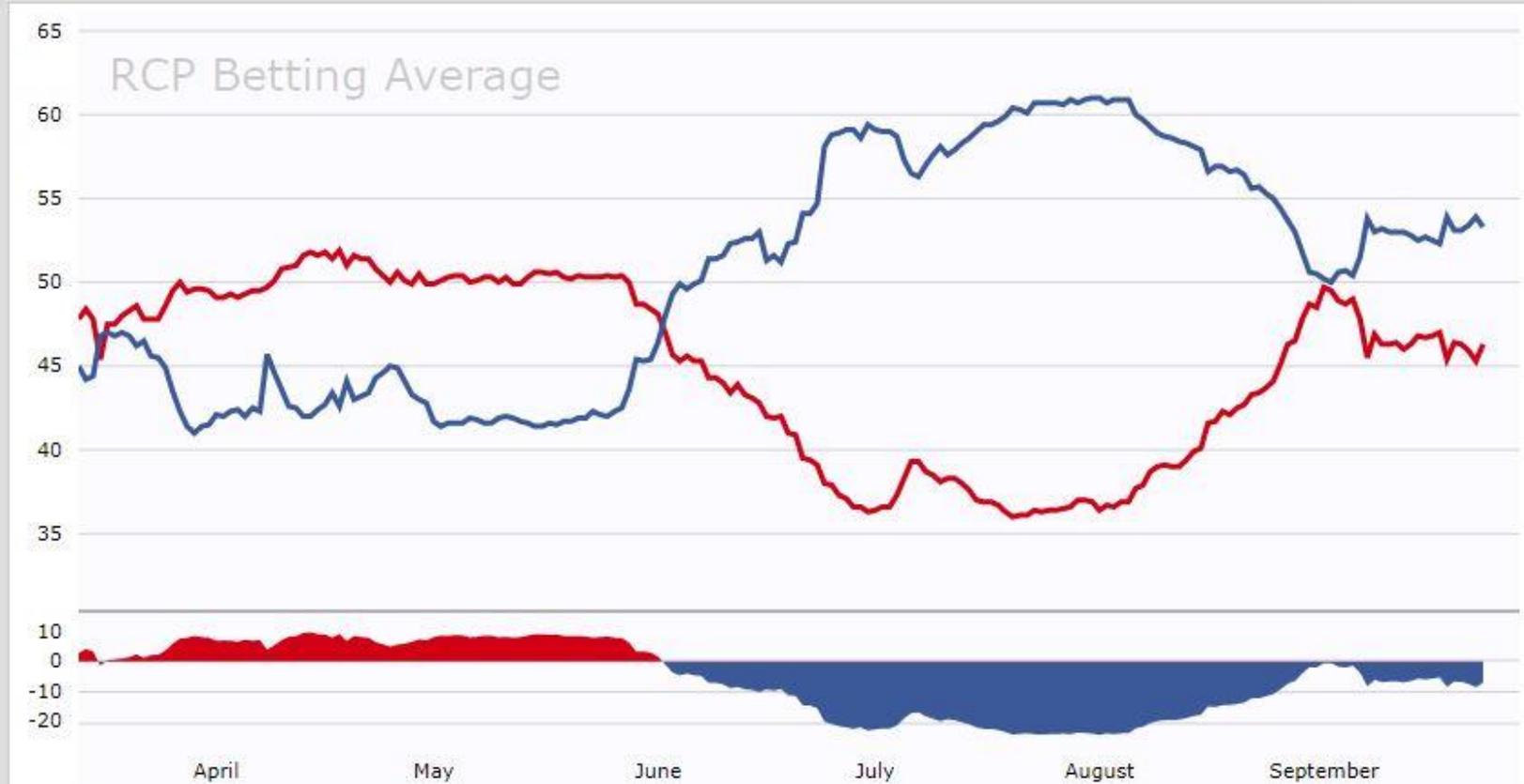
Polls:

Biden ahead



RCP BETTING AVERAGE
Betting Odds: Trump vs. Biden

53.3 Biden (D)
46.3 Trump (R)



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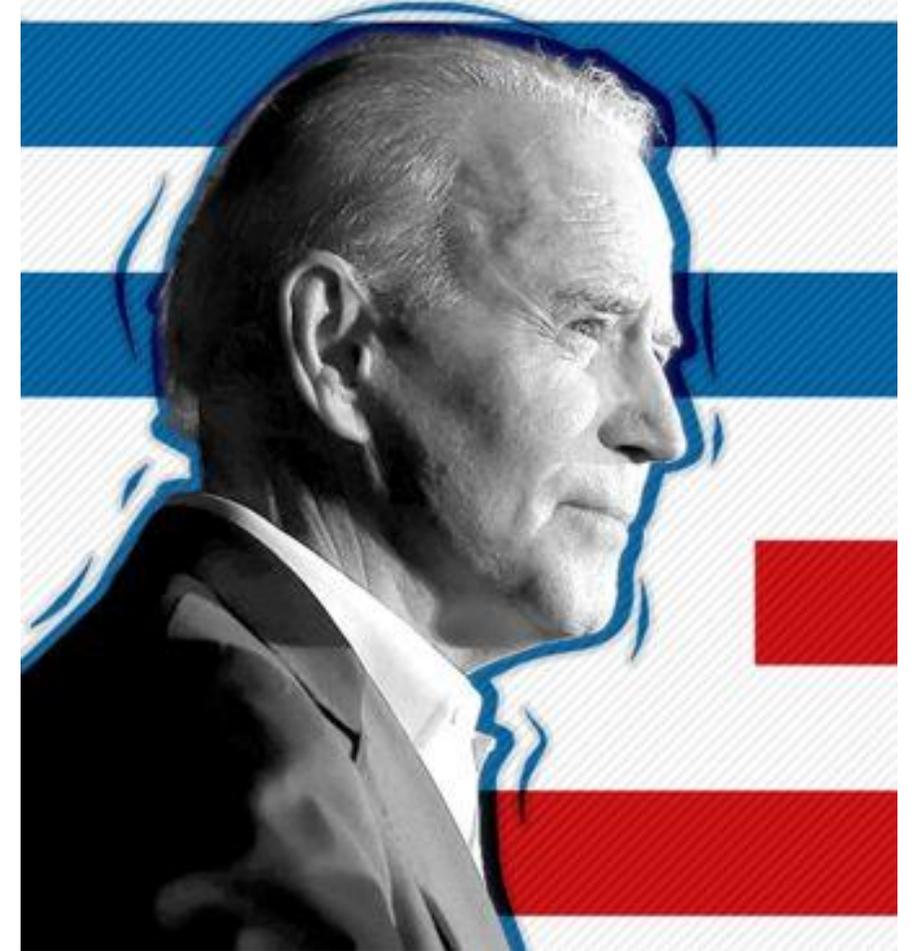
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Platforms:

Biden

- Unification
- Virus science
- Tax / Minimum wage increases
- Infrastructure and green investment increases
- Healthcare
- Multi-lateral diplomacy
- BLM



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Platforms:

Trump

- Division
- Smash China
- Virus voodoo
- Questionable infrastructure
- Some tax cuts
- Hard borders
- Hard diplomacy
- Law and order BLM



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Black Swans:

- Ruth Bader Ginsburg
- Stalled Fiscal
- Monetary implications
- China Shock
- Antifa?



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Outcomes:

- Dems clean sweep
- Dems paralysis
- Trump victory
- Trump victory then Dems victory



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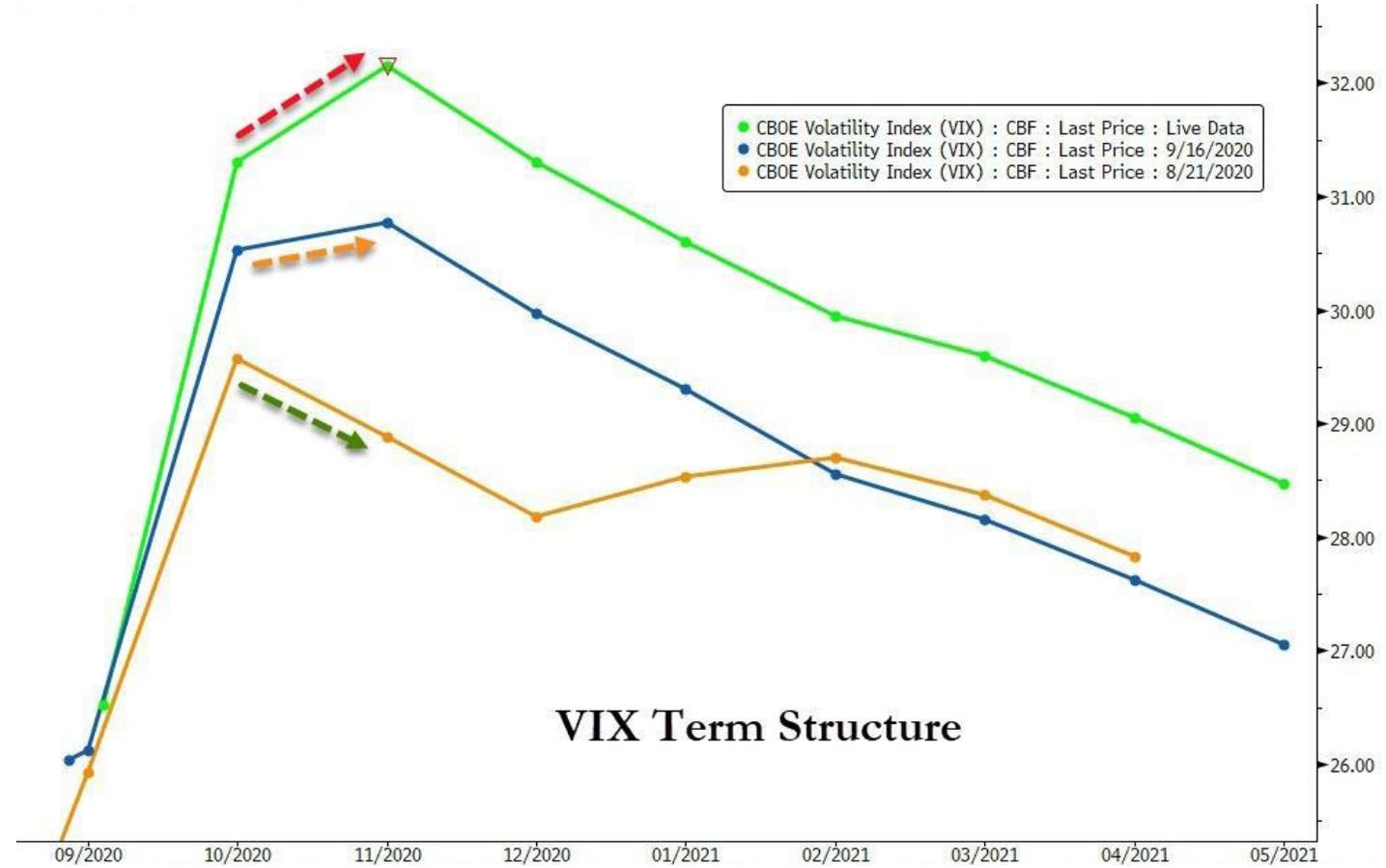
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Markets:

- Volatility Rocket
- Stocks smashed
- Australian dollar smashed
- Buying opportunity for vaccineflation

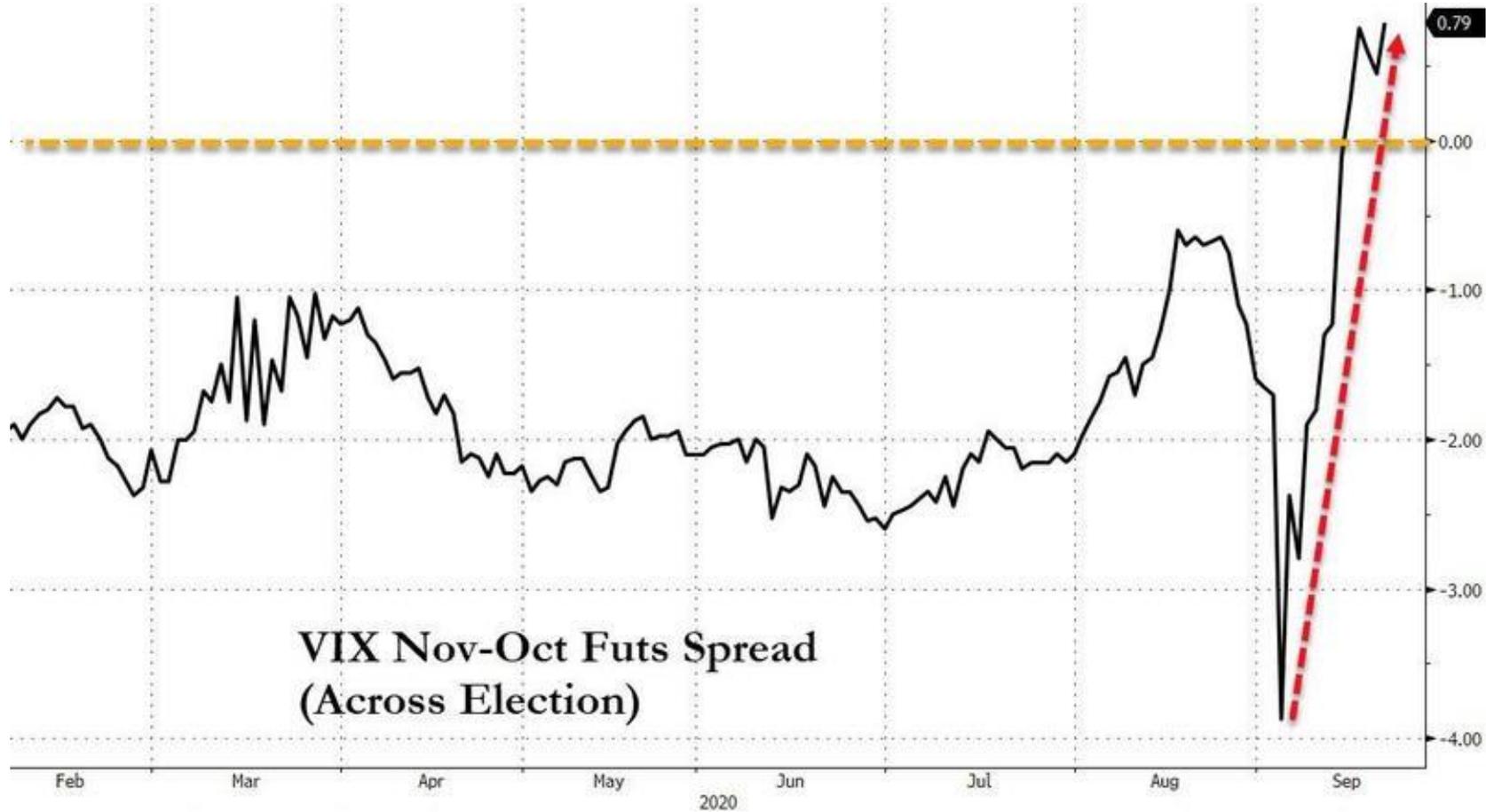


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Investment Outlook

Caution

- Cautious outlook. International and bonds still generating value
- Low return environment, but volatile
- Need to be more active than in the past



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View question of the week:

How do you think markets will respond to an election win in either direction?

Drop your answers in the comments



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