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skVictory three things



Can you believe April is almost over....wow this year is flying. Ha! But seriously, in a just a few zillion days or so—it will May. Warmer days ahead. “Sell in May, And Go Away Again, Someday!” Soon!

50 years ago in April, a bunch of NASA-nerds brought a severely hobbled Apollo 13 safely back down to earth, against enormous odds and crazy time constraints. Flight director Gene Kranz famously said-- *“I have never lost an American in space, sure as hell aren’t going to lose one now. This crew is coming home. You got to believe it. Your team must believe it. And we must make it happen.”* I think you see where I am going here. American genius, ingenuity and grit is being put to the test again today. Tom Hanks played Commander Jim Lovell in the wonderful movie, and in real life survived COVID-19. Coincidence? I think not! “Houston, we got this!”



“I got you, babe”, Sonny & Cher, blared my ole’ clock radio at 6:00am ...as it does every “ground hog day” these days. I slammed off the alarm, held my breath, quick prayer, then turned on the TV. Phew, pre-market up. Major shifts in investor sentiments are riding on tiny tidbits of hope these days. It occurs to me, we might be a meaningful medical breakthrough away from this market “distancing” itself from these levels, leaving market timers and pessimists in its wake. *“Many antivirals are being tested, and good news from any one of the major drug trails will likely cause a 5,000 point rally in the Dow. Other indexes, of course, would rise too,”* Nigam Arora, CIO, The Arora Report. Again, while many continue to wring-well-washed-hands, and caution incessantly about downside risk, it feels to me the focus should shift from less worry about the next 20% move, but instead making sure you don’t miss the next 100%+ move.

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By the way, don't let the rah-rah, quotes, stats...make you think I don't appreciate the seriousness of it all. We are living in a world that nobody could possibly have envisioned a few months ago. The impact caused by the virus has disrupted life around the globe. We have friends and loved ones who are dealing with this disease. It's incredibly unpleasant. Yet unexpected blessings have surfaced. People are reaching out to family and friends via texting and emails. And Zoom! Some are even connecting the old-fashioned way—by phone. (*Yes kids, it also works as a phone!*) Families are drawing closer than they have ever been before. Activities and jobs around the country have been suspended but not ended. And I am confident we will see an economic recovery take root and the pandemic will subside. The above is giant photo on the wall behind my desk. It has traveled to several different office with me over the years—always placed just over my shoulder for nearly three decades. My subliminal message to visiting clients—rocky shores in the foreground, smoother horizon in the distance....We are a resilient people. My career has taught me over and over, growth takes grit. You are showing it. Stay safe. Stay bullish.

As always, I'm honored and humbled you have given me the opportunity to serve as your financial advisor. I am lucky to be in the foxhole with the greatest clients in all the land. We hope you view us as your **friendly, knowledgeable, and reassuring source of financial guidance.**

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