

Markets to Head Higher After Rocky Period (Radio)

David Kotok, Chief Investment Officer/Co-Founder, Cumberland Advisors, joined Bryan Curtis and Rishaad Salamat on Daybreak Asia. He says the fundamental issue for markets is still trade, he goes on to say whatever the outcome of the midterm elections, we will then have clarity for the next two years.

“Just lifting the uncertainty, I believe, will give the market room to recover. So, in our shop, we still see new highs by the end of the decade. We don’t see a recession. We do see a slowdown because of the trade war. We’re already seeing it. We do see a little more inflation for the same reason. Although a strong dollar helps dampen that as long as the currency stays that way. And we think markets are going to head higher after we get through this rocky period.”

-David Kotok

Running time 06:06



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Chairman of the Board
&
Chief Investment Officer



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If you like podcasts, check out this one from 2015 featuring David Kotok talking about his background and Camp Kotok with Barry Ritholtz. They also talk about the history of Cumberland Advisors since its founding, and delve into fundamental principles of investing and valuation.

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