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Nota di contenuto	Being Right or Making Money; Disclaimer; Contents; Foreword; Preface; Acknowledgments; CHAPTER 1 Being Right or Making Money; Bad News about Forecasting (Being Right); Good News about Making Money; Being Right and Other Investment Techniques Are Overrated and Are Not the Keys to Success; The Four Real Keys to Making Money; The Battle for Investment Survival and Handling Mistakes; Stories of Five Successful Winners; Making Our Own Reality; The Ned Davis Research Response to All This; Timing Models; What Is Contrary Opinion and How to Use It; History and Risk Management; The Rest of the Book Notes CHAPTER 2 The Model-Building Process; The Model-Building Process; Where to Start: Model Inputs; Sentiment and Valuation Indicators; Monetary Indicators; Economic Indicators; Internal Indicators; Moving Averages; Crossings and Slopes; Momentum; Putting Indicators Together; Conclusion; CHAPTER 3 A Stock Market Model; A Stock Market Model; Overview of the Fab Five; Tape Component; The Final Tape Component; The Sentiment Component; Sentiment Summary; The Monetary Model; Monetary Component Summary; Fab Five Combo Component; Combo Model Summary; Summing Up the Fab Five; How We Use the Fab Five CHAPTER 4 A Simple Model for Bonds A Slight Modification; Summary; CHAPTER 5 Potential Bear Market in 2014; Bearish Secular Residue and

Then Buying Opportunity; Preparing for a (Say, 20 Percent) Bear Market; Sentiment and Valuation Indicators, If One Wanted to Be Bearish; Other Sentiment Indicators; Valuation Problems; Trend Indicators to Plan for a Potential Pullback-Follow the Leaders; More Leading Indicators of Market Peaks; Four-Year Presidential Cycle Risks; Macro Backdrop: Debt Bubble Update; Watching Fed Policy to Prepare for a Major Pullback in 2014; Watch Inflation

Watch Financial Conditions and Interest Rates What Do Demographics Say?; CHAPTER 6 The Aging World: Economic and Market Implications; Global Population View; Population Growth Slowing; Median Age Rising; Seniors' Share Rising; Why Is the Population Getting Older?; Fertility Rates Are Declining; People Are Living Longer; Demographic Developments; Demographic Dividend; Oldest Getting Older; Echo Boom versus Baby Boom; Implications of Aging Populations; Stock Market; Savings; Financial Burdens on the Government and Younger Generations; Inflation; Interest Rates

Ways to Offset a Declining Workforce Retirement Age; Immigration; Fertility Rates; Women in the Workforce; Conclusion; CHAPTER 7 United States Energy Independence - A Game-Changer; What the United States Consumes; The Thorn in the Side of Energy Independence-Oil and Transportation; Choosing the Right Fuel; Why Electric Could Be a Game-Changer; Why Electric Has Yet to Take Off; How Far Ned Could Go; Nat Gas-An Indirect Play on Electric; The Immediate Impact of Abundant U.S. Energy Resources; A Potential Headache for the U.S. Manufacturing Resurgence; Conclusion; About the Authors  
About the Contributors

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## Sommario/riassunto

This book is about the four common traits of successful money managers. Bringing the Ned Davis Research Group's insights and experience to the table, it's a dissection of what contributed to the stock market bubble of 2000 and a no-nonsense look into what is moving our economy right now. The economy model building process and analyses of stock and bond market timing are discussed in depth. According to Ned Davis, the business of speculating is largely psychological. As he states: "In case we are being swept up by the crowd or in case our own reality becomes badly distorted, what we need is

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