

## Mark Collinsworth

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**From:** Vere Global Private Asset Management <info@vereglobal.com>  
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**To:** Mark Collinsworth  
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### Vere Global Weekly Commentary - 8 January 2020

#### **Let's Talk Iran:**

Long story short, Iran is a political issue and not an economic issue. The US military (see chart below) has way more resources than Iran. In addition, the US spends over \$700 billion on training and research and development vs Iran's \$6 billion a year investment. That means that not only is the US's military larger, we are light years ahead of them in technology. Remember in the 1980's Iraq was kicking the living day lights out of Iran. When Iraq tangled with America in 1990 the US totally wiped Iraq's army out in 30 days. This not to say that there will be some terrorists attacks here and there, but they will be few and small and very unlikely to occur in the US.

#### **What to do?**

The short answer is nothing. Any selloff should be short lived and a good opportunity to pick up some stocks. There really should be no impact on the economy and actually a spat with Iran might be an economic positive since American oil drillers would benefit from higher prices and defense firms would see more contracts. With that being said, February, in the last few years, has started to become the worst performance month of the year for stocks. September still holds the record for the worst month for the last 50 years, but February is trying to catch up.

#### **New Year, another election:**

Historically in election years, the stock market goes up about 10 to 11% and has

a habit of being very consistent. Since 1928 there have only been 4 down years, with 2008 being the most recent.



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