

MicroFundy

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MICROFUNDY

Dec 11, 2017 at 1:16 PM

Bitcoin: More Tulips Than Gold



"We think that Bitcoin is a gold disruptor," Winklevoss said in a telephone interview on Friday, predicting it may yet appreciate by 10 to 20 times its current value. "We

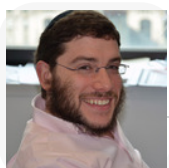
ABOUT

MICROFUNDY

MicroFundy is written by Aron Pinson, CFA, Chief Investment Officer at LPS Financial LLC, an SEC Registered Investment Advisor.

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1 NOTE

MICROFUNDY
May 23, 2017 at 12:32 PM

“Take the Story out of the Stock” A new Activism playbook?



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\$IAC \$MTCH \$ANGI \$TSLA \$GOOG \$GOOGL
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Is that Apple's Echo that I hear?



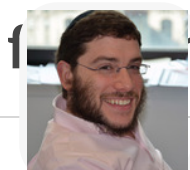
When looking at stock performance for large companies:
Multiple Expansion > Earnings Growth.

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1 NOTE

Here's a lesson in investing



for the Super Bowl HOME ▾



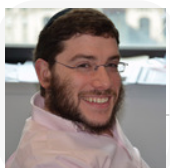
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Feb 02, 2017 at 1:37 PM

What Trump Rally?



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2 NOTES

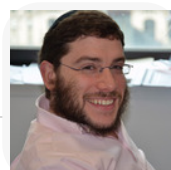
MICROFUNDY

Sep 08, 2015 at 5:34 PM

Yahoo seems undervalued once again



Based on my analysis, shares of Yahoo Inc. ([\\$YHOO](#)) are currently pricing in a full 35% taxation on their entire Alibaba Group Holding ([\\$BABA](#)) stake.



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\$YHOO

\$BABA

1 NOTE

MICROFUNDY

Aug 11, 2015 at 10:35 AM

Why Google is spiking today

The image shows the word "Alphabet" in its characteristic multi-colored font (blue, red, green, yellow, blue) with a soft, light-colored glow around the letters.

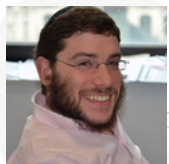
Transparency is a funny thing.

I think many companies - predominantly higher growth, momentum, or even private equity names - would get punished for being more transparent.

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\$GOOGL

\$GOOG



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Jul 31, 2015 at 1:16 PM

Links from the month that was

[Matt Levine](#) on shorting shrimp, stocks, & houses.

[“It’s Hard to Bet Against Houses”](#)

Bridgewater’s Ray Dalio & Co’ with updated (changed) views on China.

[“Bridgewater Daily Observation: Greater Risks in China”](#) (pdf)

Ara Lovitt, a portfolio manager at GMO, wrote a White Paper on credit cycles.

[“What Do High-Yield Maturities Tell Us About Timing.](#)

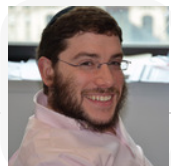
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Jul 21, 2015 at 5:26 PM

A Google invite to Apple traders



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2 NOTES

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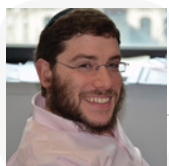
Jul 14, 2015 at 7:49 AM

Clips from Benzinga's PreMarket Show

Earlier this month, I had the pleasure to be interviewed by Joel Elconin on [Benzinga's PreMarket show](#).

Here are the clips and related blog posts:

[Why I like eBay after the PayPal spin-off](#)



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