



Investment Wisdom Podcast – Day 3 of 12

Adam Butler, CFA, CAIA - July 5, 2019



Investment Strategy Insights

Is it Time for Managed Futures?

A.I. & Machine Learning

Machine Learning Part Two: “Smart” Tools Help Provide Better Investment Outcomes

Investment Strategy Insights

Investment Wisdom Podcast – Day 2 of 12



IPO of the Week: Zscaler

Josef Schuster - July 5, 2019

Company Insights

Incorporated in 2007 as SafeChannel, Zscaler is a cloud security company headquartered in San Jose, California. Zscaler offers a cloud platform, together with related support services to provide privacy and security for both internal and external network connections.

Texas Reconsiders Flaring

Simon Lack, Portfolio Manager - July 3, 2019

Nothing exemplifies America's low natural gas prices more than its flaring where takeaway infrastructure is inadequate. In the Permian basin in West Texas and...

The Most Crowded Trade of the Year: Fear, Uncertainty, and Doubt

Eric Clark, Portfolio Manager - July 2, 2019

Consumer Trends Insights

As one would expect euphoric periods offer poor returns and periods with horrendous sentiment tend to offer more attractive returns. Let's see where the crowded trades are now.

Partnering with Pipeline Protesters

Simon Lack, Portfolio Manager - June 30, 2019

Energy & Infrastructure Insights

Suppose that the owner of a pipeline operating at 100% capacity opposed the construction by a competitor seeking to meet unsatisfied demand. Or consider...

IPO of the Week: Invitation Homes, Inc.

Josef Schuster - June 26, 2019

Founded in 2012, Invitation Homes is a single-family homes rental company. The company owns and operates homes for lease in the United States.

America Questions Role As World's Super-Cop

Simon Lack, Portfolio Manager - June 26, 2019

Energy & Infrastructure Insights

On Monday, President Trump asked, "Why are we protecting the shipping lanes for other countries (many years) for zero compensation?" Few American voters give much...



Market Trends & Outlook

Oil Prices are Pumped Up

Kimberly Rios, CFA, CMT, Portfolio Manager - June 20, 2019

Gold Prices Take a Breather

Kimberly Rios, CFA, CMT, Portfolio Manager - June 11, 2019

Oil Edges the \$50 Support Level on Lack of Demand

Kimberly Rios, CFA, CMT, Portfolio Manager - June 5, 2019

COMPANY INSIGHTS

IPO of the Week: Zscaler

July 5, 2019

IPO of the Week: Invitation Homes, Inc.

June 26, 2019

IPO of the Week: MongoDB, Inc.

June 20, 2019

Plain Talk, Fuzzy Math

June 16, 2019

IPO of the Week: Hershey

June 13, 2019

IPO of the Week: Altice

June 5, 2019

Technology & Investing



A.I. & Machine Learning

Systematic Manager Discusses Machine Learning

Grant Smith, Portfolio Manager - May 30, 2019

Is it a single tool or is it something much bigger than that?

Look to Texas Instrument's \$12 Billion Stock Buyback as Opportunity in Semiconductors

Michael Schoonover, COO & Portfolio Manager - September 21, 2018

Industrials and Technology Buybacks Diverge in Response to Trade War Rhetoric

Michael Schoonover, COO & Portfolio Manager - July 13, 2018

Facebook Adds \$9B to Buyback on Earnings Beat

Michael Schoonover, COO & Portfolio Manager - April 26, 2018

Economic Insights

Our Prosperity is Tied to the U.S. Economy

Eric Clark, Portfolio Manager - June 24, 2019

Companies Benefiting from Strong Chinese Consumer Demand

Eric Clark, Portfolio Manager - June 14, 2019

Can Trump Manage the Economic Cycle?

Simon Lack, Portfolio Manager - June 12, 2019

Miscounting America's Crude

Simon Lack, Portfolio Manager - June 9, 2019

Investment Strategy Insights

Investment Strategy Insights

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Adam Butler, CFA, CAIA - July 5, 2019

By understanding how each asset-class behaves throughout the four economic regimes, investors will not need to rely on predictions to thrive in most market environment. Welcome to Day 3.



Investment Strategy Insights

Is it Time for Managed Futures?

Craig Weynand - July 2, 2019

Investment Manager Sees the Current Market Environment as an Opportune Time to Allocate to Managed Futures

Investment Strategy Insights

Investment Wisdom Podcast – Day 2 of 12

Adam Butler, CFA, CAIA - June 25, 2019

In episode one we described an investment arena that is likely to provide the best long-term opportunities.

Consumer Trends Insights

A Podcast on stock screening techniques and recent consumer trends

Eric Clark, Portfolio Manager - June 20, 2019

Brand guru Eric Clark did a recent podcast on Investing City where he talks about identifying great stocks as well as recent consumer trends.

About Catalyst Insights

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2 of 12**

Consumer Trends
Insights

**A Podcast on
stock
screening
techniques
and recent
consumer
trends**

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Podcast: Day 1**

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Investment Strategy Insights

Is it Time for Managed Futures?

Craig Weynand - July 2, 2019

Investment Manager Sees the Current Market Environment as an Opportune Time to Allocate to Managed Futures



**Machine Learning
Part Two:
“Smart” Tools
Help Provide
Better
Investment
Outcomes**

June 26, 2019



**Mid-Stream
Energy
Infrastructure
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Bright**

June 20, 2019



**Driving Winners
in the IPO Market**

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fixed...**

June 5, 2019

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Extremes**

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This Summer?**

May 17, 2019

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July 5, 2019



Is it Time for Managed Futures?

July 2, 2019



Machine Learning Part Two: "Smart" Tools Help Provide Better Investment Outcomes

June 26, 2019

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IPO of the Week: Match Group
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IPO of the Week: MongoDB, Inc.
June 20, 2019

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