

Your weekly market update

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## Market Update

10 November 2016

Populist movements are sweeping the globe. Overall, Mr. Trump's victory showcases the significant discontent felt by many voters, a sentiment that is reflected in the increasing status of populist parties in Europe. Populist parties have become notably popular in Italy and France, which are both holding referendums and elections in the coming months. Speculation about the potential outcomes of those votes could cause further market volatility as they draw closer.

Trump's acceptance speech is an about face from his election pledges which softened market volatility and reduced market declines around the world. What are the most obvious things President Trump will pursue: expansion for energy extraction by American firms, reform immigration, secure borders, spend on infrastructure and create jobs.

Historically markets drop after a presidential election on average 1.8% the first day. Markets have recovered from over night lows and are rallying into the afternoon. Expectation was that we would see a Brexit style sell off.

Rience Priebus will more than likely be the next secretary of state. It is Mr. Priebus' "all in" push to have Trump's win paid off. Currently, Rience Priebus serves as the Chairman of the Republican National Committee and will be aggressive in the days ahead to bring unity within the Republican Party. Mr. Priebus did



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or contact us at:

Tel: 1-519-570-4754

Fax: 1-519-954-4754

email: [ahmet@ahmetjakupi.com](mailto:ahmet@ahmetjakupi.com)

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the impossible and unified the Republican Party. Structurally, the fact that the Republicans control both the house and senate means that Trump's administration has the ability to bring about real change without relying on making too many deals with the Democrats. January 20th, 2017 will be the day of transfer of power from President Obama and President Trump. Traditionally, markets view such a sweeping victory as positive for equity and assets. The volatility index already reflects a significant reduction in risk by dropping 15.47% after only a few hours after Trump's acceptance speech. Markets have switched to a risk on mode.

Republicans are calling President Trump the next Theodore Roosevelt. Both men are from family wealth and political outsiders. The big concern over the next days is to have the American people come together and be unified under one leader. Leaders all over the world are congratulating Trump on becoming president. As I mentioned earlier, the Democratic Party was expected to win but has not materialized. How does the Democratic Party come together after marking such aggressive statements about Trump? Personally, Hillary's loss has shattered the Democratic Party and opened the door for Bernie Sanders to take center stage amongst. Where Hillary, her team and the vast democratic voters go from here is a key concern. The Democrats expected to win in a sweep. Let's not underestimate the mega ton bomb that has been set off with in the Democratic Party. I'm most certain this party will need to refine themselves and the future leaders it puts forth. The Democratic Party has received a major set back.

One thing it is clear, Americans wants change and do not want anything to do with the current established politico's whether it is the Bush family or the Clinton family.

So let's examine how markets are translating with a Trump win:

- Pro business result
- Lower corporate taxes
- Less banking regulation
- Health care opportunities
- Pro energy extraction
- Infrastructure spending
- Capital Repatriation

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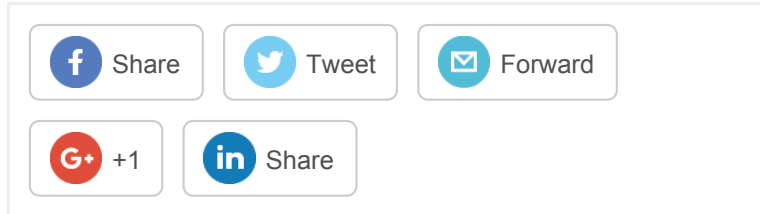
The American election process was expected to be a revolution of change but as we see events unfold, it looks to be an evolution in the American people's mindset in deep need for change.

Hillary Clinton's speech was emotional but accepting of the Trump administrations. Such a strategic speech will go along way to stabilize market concerns by promoting a unified nation under one leader. She delivered a very inspiring and connective speech.

Assets as we speak are moving out of bonds into American equities along with the TSX.

Appetite for risk is on. Safety positions are being shed.

**Please look forward to our next Market Update on Friday November 25th!**



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