



"You First"

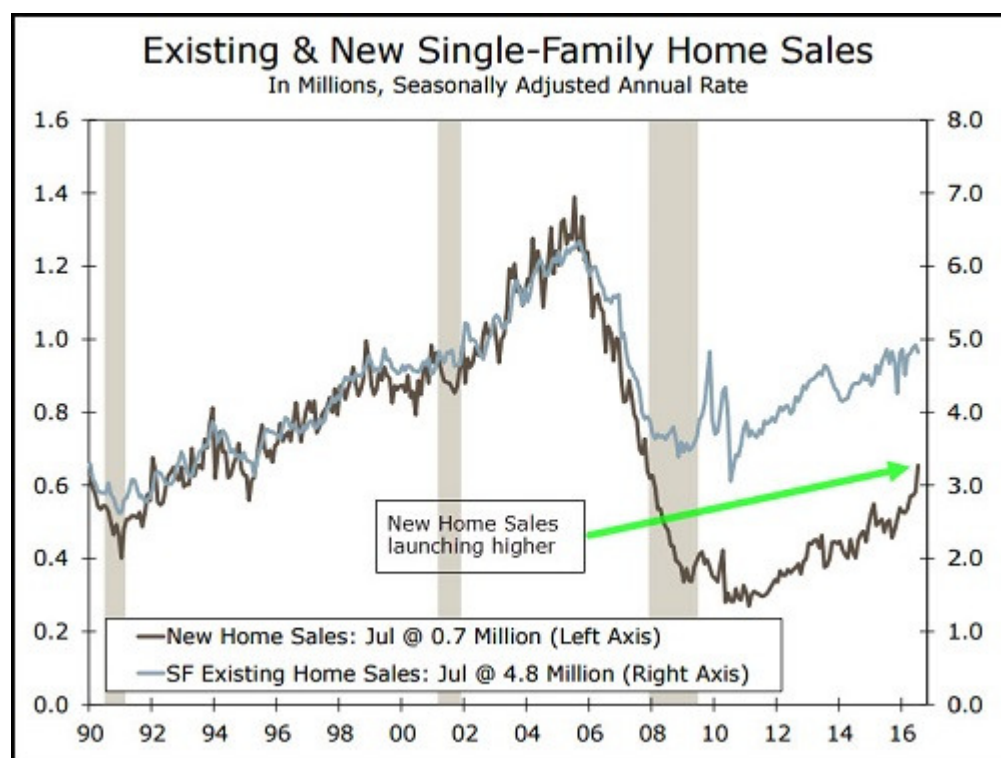
Today is Tuesday August 30 and it is around 1pm.

As we end the month of August, the much anticipated summer swoon has failed to materialize. Had we listened to all the naysayers, we would have missed the summer rally.

Now many of the pundits are talking about the month of September being the seasonally worst month for the market. They are also talking about a possible rate hike in September based on Jackson Hole 2016 comments and conversations. Yet all major averages remain above their intermediate and long term trend lines. So from a trend standpoint, I remain positive until proven otherwise.

Let's see what the jobs number is on Friday. My guess is that the Fed doesn't want to inject itself into the politics of the November election. Plus our dysfunctional Congress has to figure out how to fund the government by the end of September. So with implications to our Nation's credit rating in the balance, my guess is that nothing will likely happen rate hike wise until after the November election.

In the meantime, new home sales continues its strong recovery relative to existing home sales according to Wells Fargo.



This could be because of the supply reduction of existing houses for sale. (ISI Group)



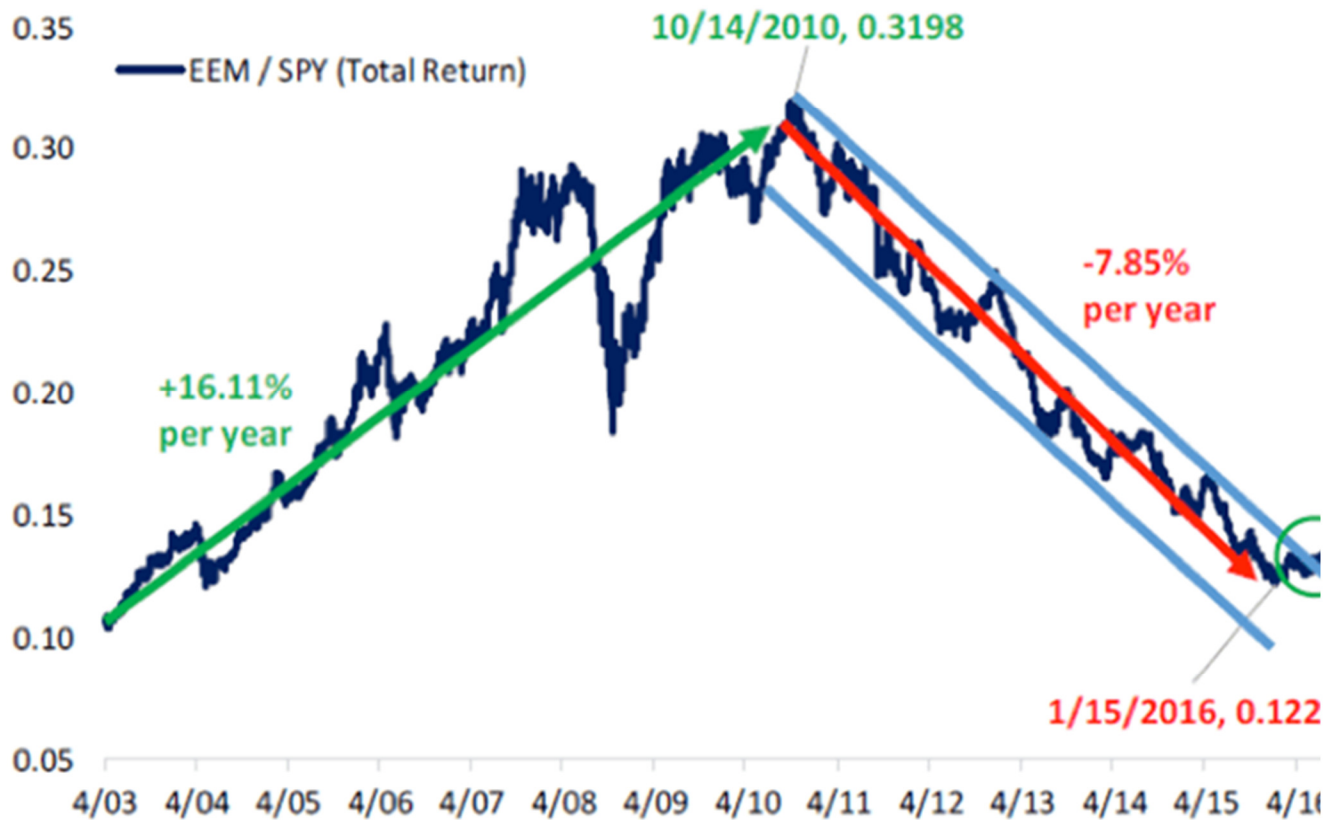
Best illustration we've seen of the housing supply shortage from the ISI Group



One final area of note is the recent action in the emerging markets. After almost 6 years of underperformance relative to the S&P 500, the emerging markets may just now be starting to come out of its funk. I will be watching this area closely in the coming months.

Chart 4

EM Has Given Up All Its Outperformance, But Is Starting To Break Out



Source: Bespoke Investment Group.

As always, should you have any questions regarding anything financial, please don't hesitate to call 407-248-9647.

Warm regards,




Edward A. McDonough MBA, CFP® | Principal



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