

## Wilson, Cameron B (RBC DS)

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**From:** Wilson, Cameron B (RBC DS)  
**Sent:** Friday, July 08, 2016 3:56 PM  
**Subject:** Market Update: July 8th 2016: The Massive Demographic Wave Coming, Brexit Recovery/US Stocks at all-time Highs, and Media Influence, App of the Week!



Wealth Management  
Dominion Securities

[Wilson Wealth Management Group](#)

Market Update: July 8th, 2016

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# Wilson Wealth Management Group

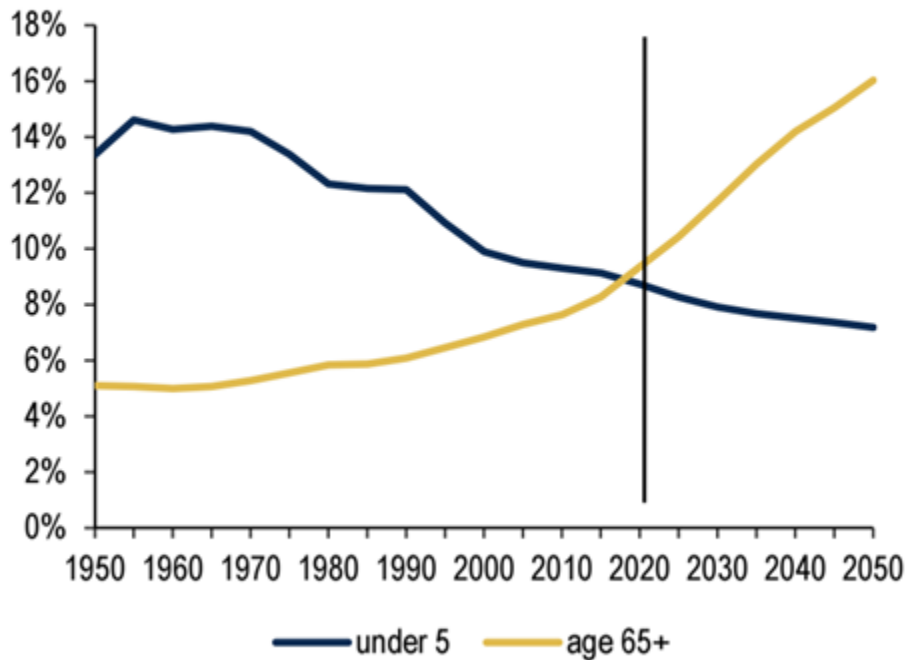
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Hello Clients and Friends,

I was cruising around Twitter the other day and came across an interesting article from the World Economic Forum (WEF). There is a huge demographic shift coming, not only in Canada but also worldwide. Which of course gets me thinking, what is the investment opportunity here? I have a few themes I am very keen on, though in the short term there may be choppiness, volatility, and uncertainty, taking a long term approach to investing and looking at macro global themes will prevail for the prudent investor. Here is the chart from WEF, and the corresponding article. [HERE](#)

### Chart 10: Young children and older people as a % of global population: 1950-2050

Number of 65+ will overtake those aged <5 by the end of this decade



Source: UN

Where are the opportunities? I believe it will be in Healthcare, why? We have almost eradicated Polio (Thank You Rotary International), and a number of other common illnesses that used to cause death. We now have medications to cure, heal, and suppress the symptoms of many ailments. Many of us, if we have the means will spend the money on our health we will. As we age it is one of the most important factors in a quality life. Thinking of my own family, and the other baby boomers. They are the age demographic controlling the majority of the wealth in the world, if they had to spend money to keep their quality of life, most certainly would.

Opportunities exist in:

Seniors Housing (Chartwell Seniors Housing, Senior Housing Properties)

Pharmaceuticals & Biotech (Johnson & Johnson, AbbVie, Pfizer)

Medical Devices (Medtronic, Abbott Labs, Stryker)

Health Benefit Providers (UnitedHealth, CVS)

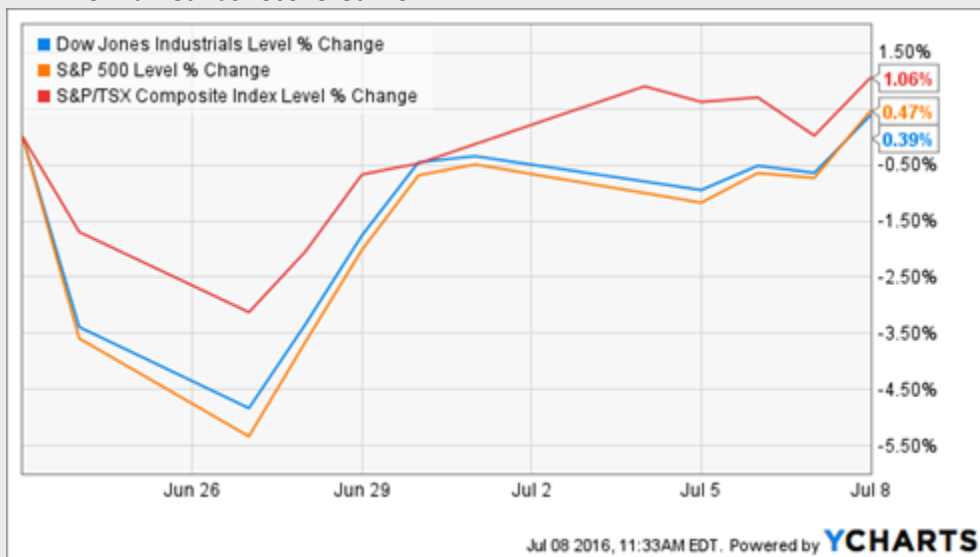
\*If you would like research reports on the above companies please send me a quick email.

#### Media Influence:

- Much to what the media may report, the US stock market is again at all-time highs, as is their bond market as well. Legend: DJI = Dow Jones Industrial, SPX = S&P500, IEF = 7-10 YR US Government Bonds, 10yr Bond Rate



- Their currency should be stronger than it is against the CAD\$ at the moment (\$0.77) in our opinion, and this will come in time.
- The US jobs numbers that came out today were much stronger than expected, and as I have written time and time again, when people have jobs, they spend money! We want them to spend money at the companies we own!
- The Market has recovered from BREXIT



**Many clients ask me what is the best stock app on the market?**

I have been using Real Time Stock Tracker for a few years now.



You can download it here:

[Stock Tracker: Real Time](#)

It's great to track your own portfolio, though I don't recommend looking at your portfolio on a daily basis. It will drive you mental, and possibly me as well. Personally I look at my portfolio every couple months. Many think I track mine on a daily basis, but I don't. I own good companies, with strong balance sheets, good dividends, and a strong track record through tough times. I let the dividends re-invest and compound on themselves.

I equate to looking at your portfolio on a daily basis to carrying around a body weight scale, and weighing yourself, after every activity. Great to know what you weigh at 10:07am, but it's really not that important.

Have an excellent week,  
Cameron

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