

US oil prices briefly touched \$130/bbl today before closing at about \$120/bbl (<https://www.cnbc.com/quotes/@CL.1>).

Gold crossed the \$2000/oz mark and settled just below at \$1998/oz (<https://goldprice.org/spot-gold.html>).

Nickel spiked over 90% before “settling” at a 73% rise today. (<https://wolfstreet.com/2022/03/07/now-nickel-goes-bananas-spikes-73-in-one-day-on-russia-sanctions-shipping-chaos-massive-short-squeeze/>)

I never thought I'd see anything like this (again). Sort of like “disruptor” IPOs and similar stocks rising exponentially in 2020. Of course, we all know what's happened to them (down, down, down).

So, before anyone makes rash decisions, I believe this too will pass. As the axiom goes, “if something can't go on forever, it won't.” This is not the same as stating commodity prices can't or won't go higher from here. Oil touched about \$150/bbl in 2008 and that is about equivalent to \$195 oil today. \$1800/oz gold in 2012 is equal to about \$2500/oz today. The commodity tracking index “DBC” almost touched \$46/share in 2008. Today it closed at \$27.60. In Sept 2007 DBC traded around \$27/share. It took 9 months to hit it's highpoint in June 2008. So, potentially (and unfortunately), there may be more to go.

The “subject” line is referring to our accounts at Nationwide Advisory. Seems like every time I write something good regarding our accounts, I jinx things. Anyway, I track about 85 different stock and bond sectors, styles, and indexes from all around the world multiple times a day. My system sorts them by the largest to smallest gainers. Today (March 7th 2022), there were exactly 10 that were in positive territory and our accounts owned all 10. Of course, we owned a few that didn't go up, but they are a relatively minor part of the accounts (at this time). So, despite the indexes being down 3% or so, our accounts were nicely positive (won't know exacts until about 10pm Pacific time). I promise this may never happen again.

(Source for all numbers: Yahoo Finance)

Please let us know if you have any questions or need anything.

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