



Our Weekly Paid Newsletter

Richard Cluver Predicts

In our 36th year of service to the investing public of South Africa



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Tis the season to be merry and, if you are a follower of this column and have also faithfully replicated my four Prospects Portfolios over the past decade, you indeed have a reason to be merry because you have done better than practically every other investor in the world.

I stress the word 'practically' because I am sure there are others who have done at least as well because the principles I employ to choose the securities in those four portfolios are very well documented in the many books I have published over the years. It's just that, search as we diligently have done, we have been completely unable to find any commercially-offered fund that has matched their performance.

Now, since this is the season for giving and, furthermore, because ShareFinder's AI projection system is suggesting that the JSE appears likely to be one of the world's best-performing markets during 2024 as detailed in the following JSE Blue Chip Index projection, I decided to push ShareFinder to create a portfolio of shares likely to outperform all the rest in the coming months.

Let's start with the Blue Chip projection so you can see what ShareFinder projects is likely to happen to that quality index:



I know that it is difficult to read the date line at the bottom of the graph when I offer such extended graphics, so just to keep you informed, the last peak in the graph occurs on September 24 2024. Overall, ShareFinder projects that the Blue Chips will gain at an annual average rate of 26 percent compound.

Now, for those of you who have walked this road with me for a long time, you will be familiar with the fact that in December 2019 when I judged that world markets were going into their last exponential phase in the aftermath of the excess liquidity the US Federal Reserve injected into the global economy in order to avert a Covid recession, I “borrowed” \$1-million in each of the three overseas markets we follow and bought “High risk” portfolios. Then I rode the markets for as long as I dared and in May 2021 I cashed in. That is why all my foreign market portfolios have a near vertical line starting at that time.

Now, since I sense that a similar event might be about to happen in South Africa, I have used the same ShareFinder algorithm to select another “High Risk” portfolio. Please note that the basis of this selection is not the usual ShareFinder Royal-quality shares which must have achieved at least ten years of constantly-rising dividends in order to justify their status. These are simply shares which are flying under speculative pressure and they can just as easily go into reverse. So, readers need to fully realise that this is a **RISK PORTFOLIO. Do not,** I stress, **do not,** bet the family silver on it:

Name	Full Name	Quantity	Action	Price
*Cash		0.00	Inject Cash	1 000 000.0000
ANGGOLD	ANGLOGOLD AS...	289.00	Buy Shares	344.9800
ANGLO	ANGLO AMERIC...	227.00	Buy Shares	439.2100
ARM	AFRICAN RAINB...	537.00	Buy Shares	186.1900
B-AFRICA		604.00	Buy Shares	165.3000
CAPITEC	CAPITEC	52.00	Buy Shares	1 897.3400
CLICKS	CLICKS GROUP L...	323.00	Buy Shares	309.3000
GLENCORE	GLENCORE XSTR...	916.00	Buy Shares	109.1000
NASPERS-N	NASPERS LIMITED	30.00	Buy Shares	3 327.0100
RICHEMONT	CFR Unknown Fu...	39.00	Buy Shares	2 533.0400
SIBANYE-S	SIBANYE GOLD ...	3 947.00	Buy Shares	25.3300

For the rest of my readers who, like me, have little appetite for risk but might like to gift their grandchildren a starting portfolio, the following is ShareFinder’s proposal for one which should deliver superior growth with the safety of blue chip quality:

Full Name	Quantity	Action	Price
	0.00	Inject Cash	1 000 000.0000
A E C I LIMITED	1 063.00	Buy Shares	104.5200
AFROCENTRIC I...	32 776.00	Buy Shares	3.3900
ANGLO AMERIC...	120.00	Buy Shares	919.9400
BHP GROUP LTD	180.00	Buy Shares	615.6800
CAPITEC	58.00	Buy Shares	1 897.3400
CLICKS GROUP L...	359.00	Buy Shares	309.3000
BURSTONE	15 453.00	Buy Shares	7.1900
MIX TELEMATIC...	20 020.00	Buy Shares	5.5500
NICTUS BEPERK	118 203.00	Buy Shares	0.9400

Since the Christmas weekend is upon us, we are releasing this column early, so may we at ShareFinder wish ALL of our readers everywhere everything they would wish themselves for the festive season and the exciting year I believe lies ahead of us!

The month ahead:

New York's SP500: I correctly predicted continuing gains until late December followed by a dip to mid-January and that view remains unchanged!

Nasdaq: I correctly predicted continued gains until a brief seasonal pause starts immediately after Christmas and lasts to January 16 when the up-trend is likely to resume until month-end ahead of a three-month decline.

London's Footsie: I correctly predicted a continuation of the brief recovery until Christmas ahead of a very cruel January which will likely be the start of a volatile decline for most of 2024.

France's Cac 40: I have clearly been too pessimistic about this market, continually here sensing an imminent market peak. Now I see a decline starting immediately in the New Year and lasting all of 2024.

Hong Kong's Hangsen: I have so far correctly predicted that the long-term decline since January is likely to continue until the end of March when a long-recovery is likely to start.

Japan's Nikkei: I correctly predicted gains which I still expect to last until the end of the month ahead of declines until mid-May.

Australia's All Ordinaries: I correctly predicted further gains with the market now likely to peak in early January followed by losses until mid-March.

JSE Top 40 Index: I correctly predicted that the sudden brief bout of weakness would be over by Monday. Now I see strength until mid-February.

ShareFinder JSE Blue Chip Index: I correctly expected a brief retreat until mid-January when the trend is likely to turn positive again until July.

Rand/Dollar: The recovery began again sooner than I expected and is likely to last all next year.

Rand/Euro: Ditto the Euro. I correctly predicted the start of a long recovery beginning December 6 and lasting to early March. But watch out for brief weakness from around January 4 to the 19th.

The Predicts accuracy rate on a running average basis since January 2001 has been 87.1 percent. For the past 12 months it has been 91.67 percent.