

Portfolio Management Business Development Corporate Strategy Global Perspective

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As a Bloomberg terminal subscriber since 2003, I hope I've earned a little bit of your attention. In 2021, I sent you an argument about the United States of America needing a better way to finance the infrastructure "needs" of our country. Bloomberg editorial didn't agree with my investment premise.

I can accept that I didn't present a compelling enough of an argument in 2021. But here we sit, almost four years later – and my argument is stronger than ever! Can you honestly say that the United States of America is in better shape financially? For the sake of our country, let's not limit my investment premise to just infrastructure; let's broaden the argument to encompass financing our American Way of Life!

We all agree that the United States of America (Government) must develop a more efficient way to finance (pay for) the American Way of Life, because the deficit spending and the debt accumulation are on an unsustainable trajectory.

The following represents an *outside of the box*, partial solution to our Nation's financing dilemma:

- Undeniably, over the last 250 years, the United States of America has built the strongest, deepest Capital Markets in the World.
- Why do we just use "one side" of the Capital Markets to finance the American Way of Life?
 - Currently, we Tax and Borrow – using the same geriatric, political arguments.
 - How is this strategy working out for us?
- In terms of generating a return (a pay back) on our investment in this great Nation, we have overlooked the most valuable component of the Capital Markets to help finance (pay for) the American Way of Life, which is the publicly traded equity market.
- It's time for our great Nation to place an "equity bet" on the American Way of Life.
 - Form a massive Private Public Partnership
 - Corporate America & the United States Government

If the Chinese can effectively allocate investment capital to the industries they deem critical to the development of their society, I firmly believe the United States of America has the investment expertise to beat the Chinese and allocate investment capital more efficiently!

Having said that, what are we going to do as a Nation? Are we going to continue pointing the finger at the other side? Or ... are we going to come together and efficiently utilize the publicly traded equity component of the capital markets to better finance the American Way of Life?

I refuse to believe that the Chinese can allocate investment capital better than the United States of America! Financially, we have developed more investment expertise than any other nation in the world!

So ... let's use this expertise to our advantage! In fact, let's work together and Make America Great Again!

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- For a more in-depth argument: www.capitalexecutive.net/strategy/privatepublicpartnership
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