



## Barbarians at the Gaetz

I do not watch T.V.

I own a T.V. that is kept in my T.V. room because it would be silly to have a T.V. room with no T.V.

However, the T.V. is not plugged in or hooked up to any system.

So when I want to watch something, I often turn to YouTube. The other day, I stumbled on a fascinating interview between a man called Tim Pool and Congressman Matt Gaetz from Florida.

I know nothing about Tim Pool. As my Dad would say, "I wouldn't know Tim Pool from a bag of assholes."

However, a lot of people know Tim Pool. He has nearly 1.5 million subscribers on YouTube and about the same number of Twitter followers.

I vaguely know Matt Gaetz. I would recognize him on the street. However, I do not recall having ever listened to him speak, and while I know he's a Republican, I do not know anything about what he stands for.

The two-hour interview was worthwhile, and I highly recommend you watch it.

Gaetz was one of the 20 or so members of Congress that forced Speaker McCarthy into concessions to take the gavel and run the House.

While many of these 20 folks have been heavily criticized for creating "chaos" in the Republican Party, they did everyone in America a huge favor.

Republicans and Democrats.

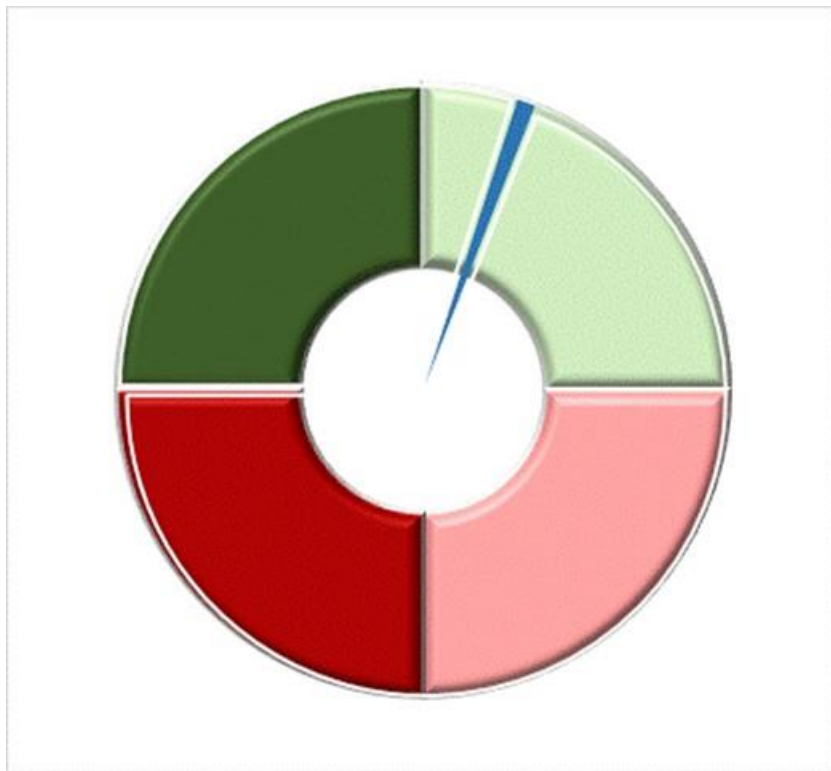
I do not want to give too much away. It's a must-watch interview.

He talks about the common ground he has with the "Squad" (far-left socialists) and the deep level of corruption in the political system.

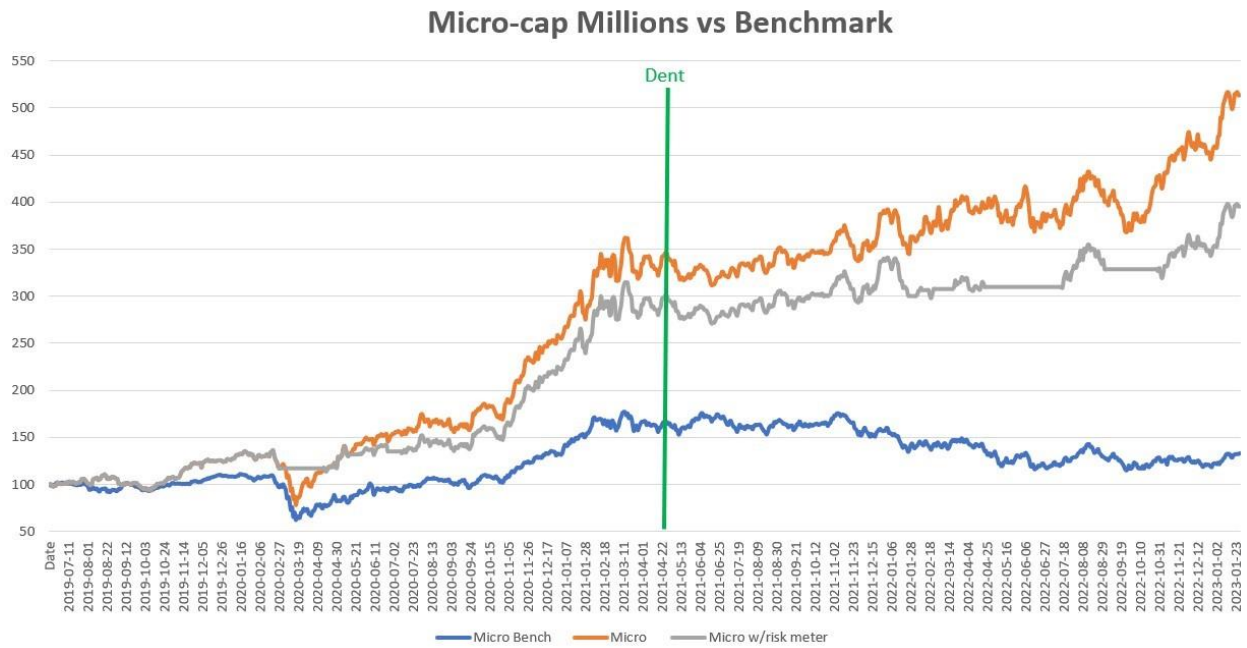
We all know, at the surface level, the system is corrupt. The corruption goes way deeper than I could have ever imagined!

Grab a beer and watch the interview!

The *Risk-O-Meter* is still in the "green zone." The market is overbought. So, I have not bought anything new over the past week, even though the market goes up daily. My equity is at all-time highs. That makes me nervous. Investing is not easy, nor should it feel that way.



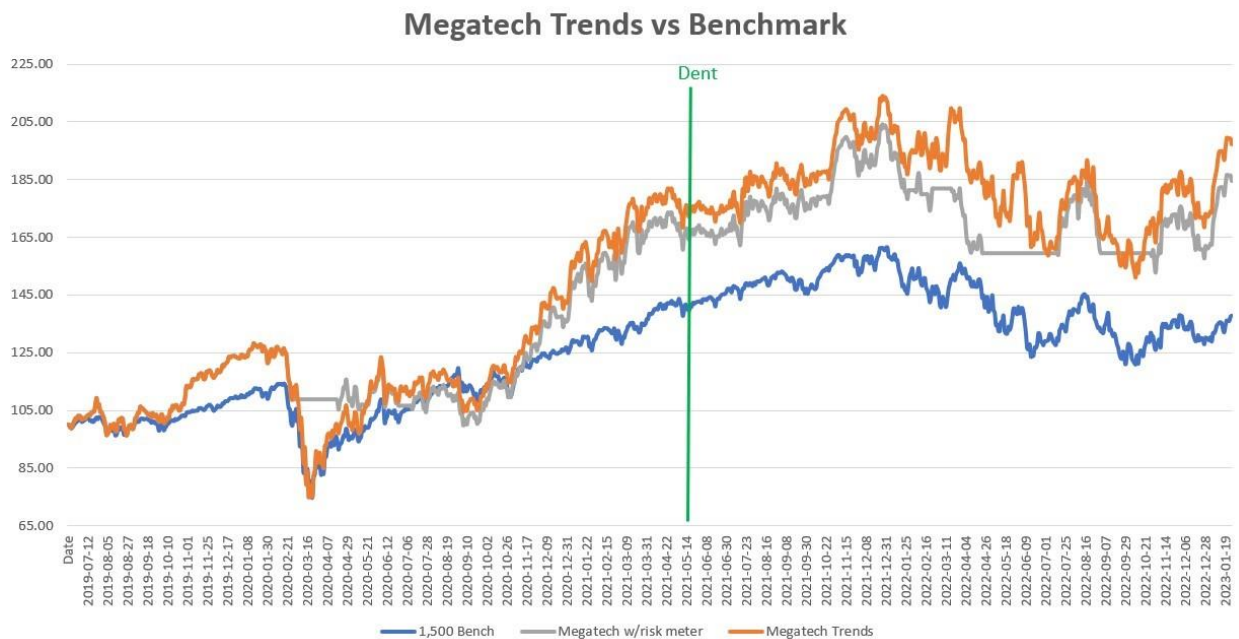
# Micro-Cap Millions



No trades this week. The strategy is at an all-time high. The trend is your friend until the end when it bends. Here is the current portfolio:

Ticker	Name	Return	Days Held	Sector
BELFB	Bel Fuse, Inc.	31.04%	158	Technology
DPSI	DecisionPoint Systems, Inc.	-14.72%	18	Technology
HCKT	The Hackett Group, Inc.	5.36%	312	Technology
IRMD	IRadimed Corp.	26.52%	81	Healthcare
IVAC	Intevac, Inc.	35.14%	81	Technology
KMDA	Kamada Ltd.	14.40%	39	Healthcare
KNSA	Kiniksa Pharmaceuticals Ltd.	0.68%	81	Healthcare
PERI	Perion Network Ltd.	87.85%	193	Technology
SMLR	Semler Scientific, Inc.	27.44%	81	Healthcare
TCMD	Tactile Systems Technology, Inc.	45.80%	74	Healthcare

# Mega-Tech Trends



There are three new trades this week.

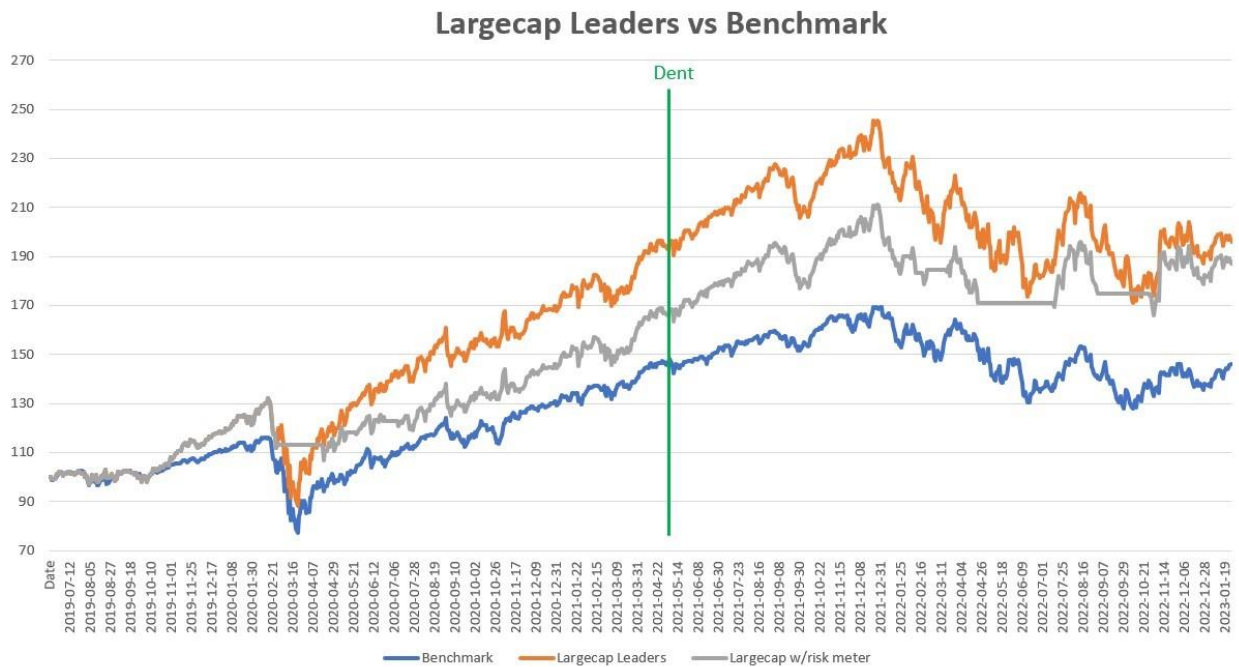
**Buy ANI Pharma (Nasdaq: ANIP), Jazz Pharma (Nasdaq: JAZZ), and Super Micro Computer, Inc. (Nasdaq: SMCI)**

**Sell CDW Corp. (Nasdaq: CDW), Coherent Corp. (Nasdaq: COHR), and Fabrinet (NYSE: FN)**

Here is the current portfolio:

Ticker	Name	Return	Days Held	Sector
ACLS	Axcelis Technologies, Inc.	35.63%	39	Technology
ANIP	ANI Pharmaceuticals, Inc.	0.00%	NEW	Healthcare
BDC	Belden, Inc.	5.39%	81	Technology
BHE	Benchmark Electronics, Inc.	-2.78%	88	Technology
JAZZ	Jazz Pharmaceuticals Plc	0.00%	NEW	Healthcare
PLAB	Photronics, Inc.	4.73%	4	Technology
RAMP	LiveRamp Holdings, Inc.	12.67%	18	Technology
SMCI	Super Micro Computer, Inc.	0.00%	NEW	Technology
TTMI	TTM Technologies, Inc.	-1.47%	39	Technology
UEIC	Universal Electronics, Inc.	1.52%	4	Technology

# Large Cap Leaders



There are three trades this week.

**Buy Analog Devices, Inc. (Nasdaq: ADI), Synopsys, Inc. (Nasdaq: SNPS), and Zimmer (NYSE: ZBH)**

**Sell Amphenol Corp. (NYSE: APH), Lam Research Corp. (Nasdaq: LRCX), and KLA Corp. (Nasdaq: KLAC)**

Here is the current portfolio:

Ticker	Name	Return	Days Held	Sector
ADI	Analog Devices, Inc.	0.00%	NEW	Technology
BDX	Becton, Dickinson & Co.	-2.90%	18	Healthcare
CSCO	Cisco Systems, Inc.	-2.39%	53	Technology
EPAM	EPAM Systems, Inc.	-5.22%	74	Technology
FDS	FactSet Research Systems, Inc.	0.97%	10	Technology
KEYS	Keysight Technologies, Inc.	0.47%	60	Technology
MRK	Merck & Co., Inc.	-3.13%	46	Healthcare
ORCL	Oracle Corp.	1.99%	4	Technology
SNPS	Synopsys, Inc.	0.00%	NEW	Technology
ZBH	Zimmer Biomet Holdings, Inc.	0.00%	NEW	Healthcare

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