

# My Favorite Growth and Income Stocks After the Euro Crisis

By Mark Skousen

Editor, *Forecasts & Strategies*

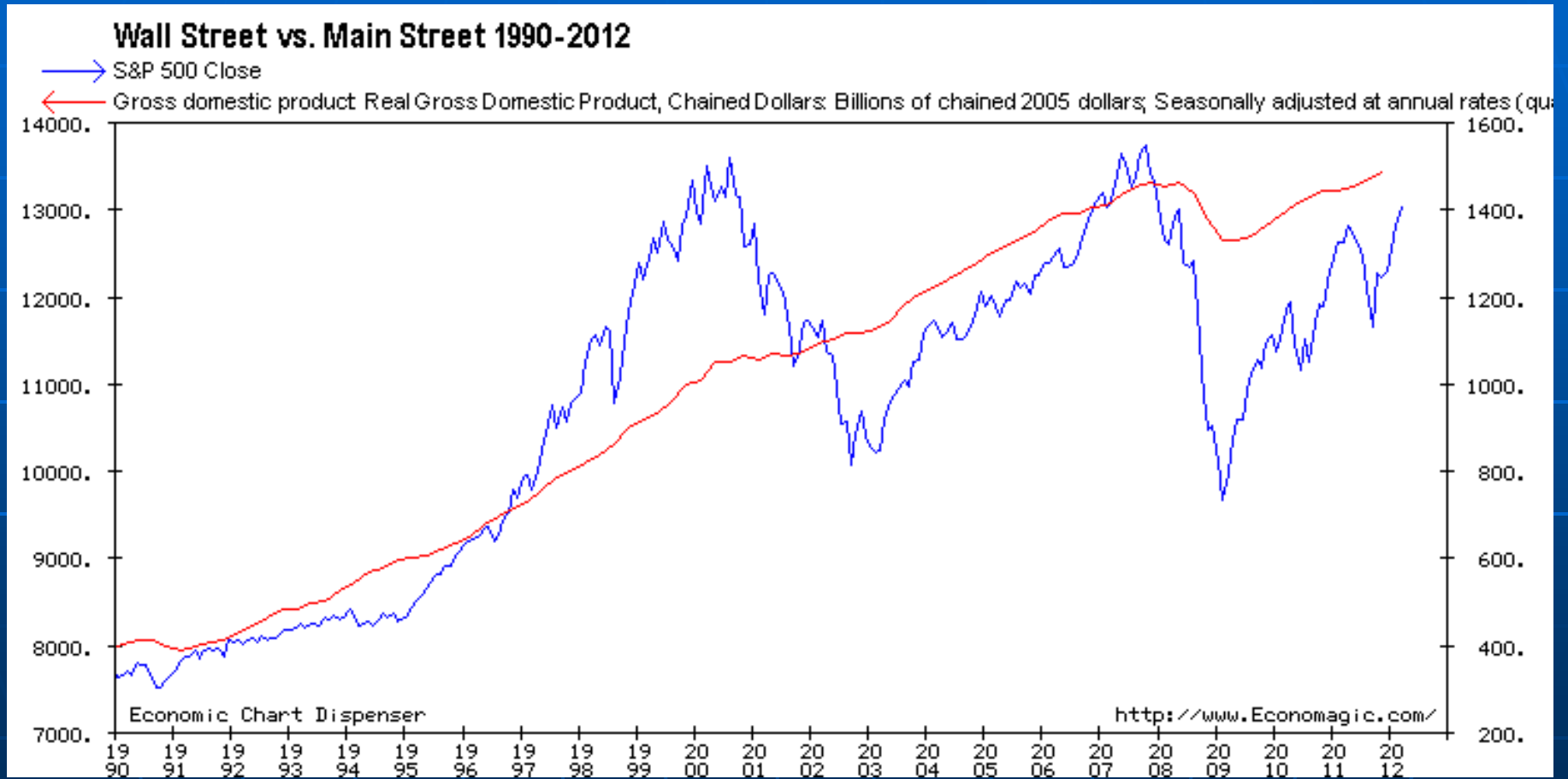
[www.MarkSkousen.com](http://www.MarkSkousen.com)

# Investing in One Lesson:

**“Wall Street exaggerates everything.”**

**“The business of investing is not the same as investing in a business.”**

# Wall Street vs. Main Street 1990-2012



# Ways to Reduce Risk and Increase Returns

## 1. Non-Correlated Investment Portfolio + Annual Rebalancing

Recommended books:

- "Elements of Investing" by Burt Malkiel
- "Gone Fishin' Portfolio," by Alex Green

## 2. Stock Index Annuities

Recommended broker:

- David T. Phillips & Co., 888/892-1102

## 3. Dividend-Paying Stocks and Funds

Recommended book:

- "Investing in One Lesson" by Mark Skousen

“Dividends are the critical factor giving the edge to most winning stocks in the long-run. ”

--Jeremy Siegel, "The Future for Investors"

“Dividends are probably the most maligned and ignored part of the average investment strategy.”

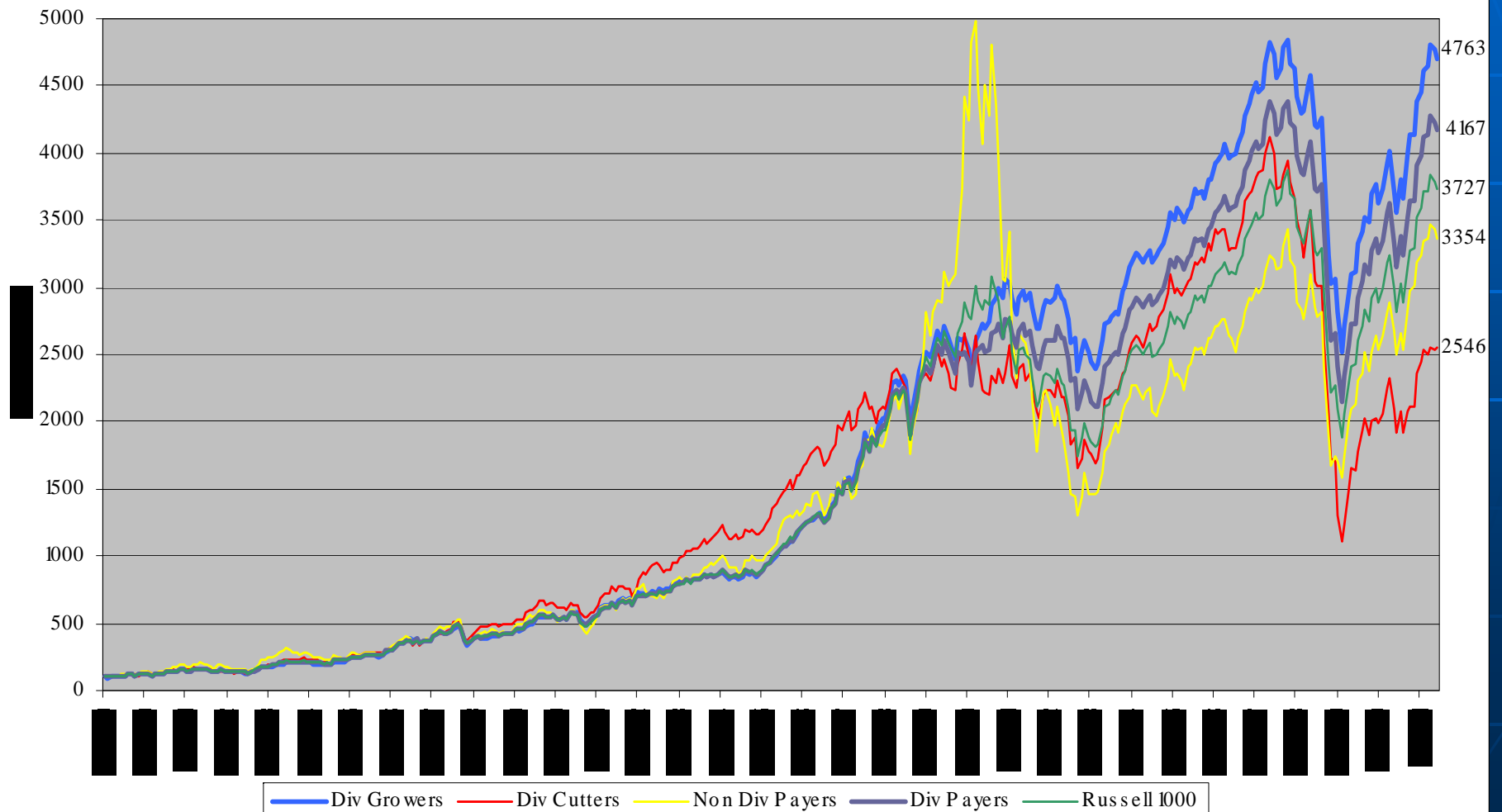
--The Motley Fool

# Why invest in dividend-paying stocks?

1. Better indicator than “earnings” of company’s financial condition.
2. Over the long run, dividend-paying stocks beat the market with less risk.
3. Dividend-paying stocks often provide bargain opportunities (speculation).

# Dividend-Paying vs. Non Dividend-Paying Stocks

Returns of Russell 1000 Stocks by Dividend Policy, 1/31/1979 - 6/30/2011  
Monthly cap-weighted geometric average of total returns of R1000 component stocks



# Rising Dividends Lead to High Total Return

- Rising dividend stocks and funds. Lowell Miller's formula: "investing with peace of mind."
- High Quality + High Yield + Growth of Yield = High Total Return



# My Five Golden High-Income Plays

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## 1. Aberdeen Asia-Pacific Income Fund (FAX)



# Five Golden High-Income Plays

## 2. Enterprise Products Partners (EPD)



# Five Golden High-Income Plays

## 3. Eaton Vance Floating Income Rate Trust (EFT)



# Five Golden High-Income Plays

## 4. Main Street Capital Corp. (MAIN)

**MAIN** (Main Street and Main Inc.) NYSE + BATS

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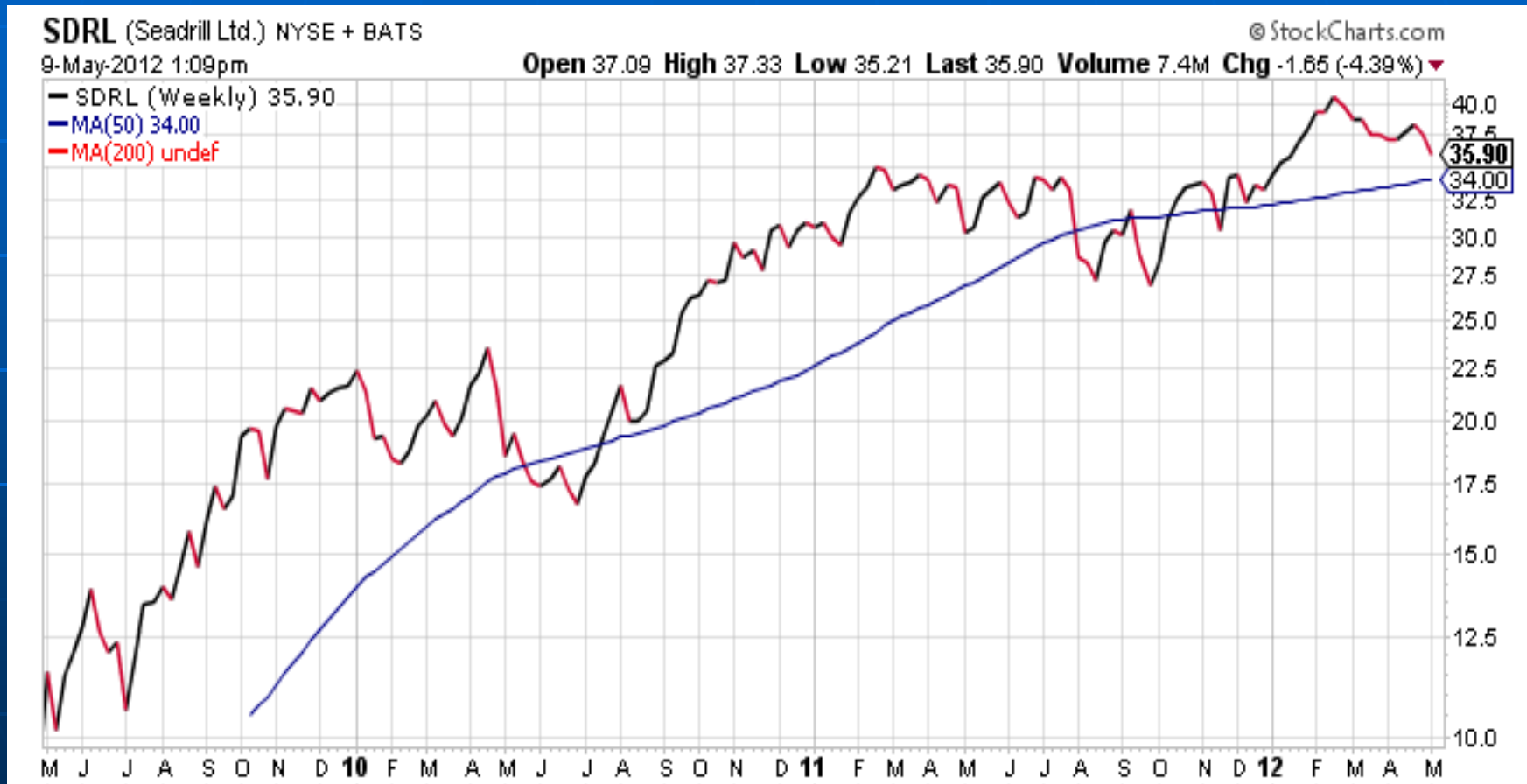
Open 24.73 High 25.81 Low 24.63 Last 25.24 Volume 499.3K Chg +0.51 (+2.06%) ▲

— MAIN (Weekly) 25.24  
— MA(50) 19.91  
— MA(200) 13.87



# Five Golden High-Income Plays

## 5. Seadrill Ltd. (SDRL)



# Warning to Income Investors: Beware of Panic Selling

“Everyone is a disciplined, long-term investor until the market goes down.”  
--Steve Forbes

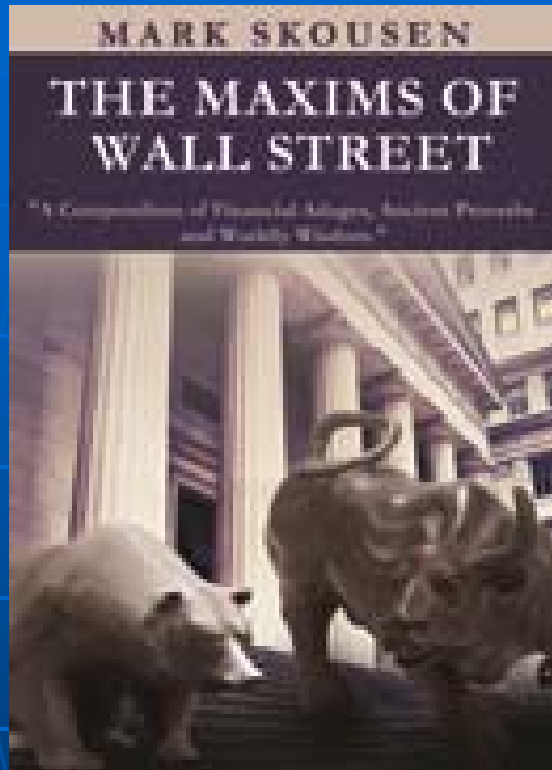
“The big profits go to the intelligent, careful and patient investor, not to the reckless and overeager speculator.”

--J. Paul Getty, “How to Be Rich”



“Do you know the only thing that gives me pleasure? It is to see my dividends coming in.”

--John D. Rockefeller



“Great little book. In fact, I plan to shamelessly steal some of the lines.”  
—Warren Buffett

Mark Skousen and Steve Forbes  
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