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Monday, June 15, 2009

BARRON'S COVER

Too Far, Too Fast

By LAUREN R. BUBLIN

Our panelists foretold the recent rally. Now they say the market has gotten ahead of itself. Their picks, pans — and sage advice: Stake a claim in gold.

2009 Midyear Roundtable Report Card

2008 Midyear Roundtable Report Card

IT'S A PANDEMIC, ALL RIGHT -- A PANDEMIC of bullishness that is sweeping stock markets here and elsewhere around the world. The Standard & Poor's 500, to take the example nearest to home, has railied more than 41%, to 945, from its intraday low of 666 in March, in celebration of the fact that our financial system somehow survived the swinish behavior of the past six years. Asian markets have caught the bug, too, and are off to the races on hopes that a global economic recovery will spur demand for

the stuff the region's factories make. Commodities appear to be infected with a strain of the same ebullience; how else to explain why oil has more than doubled in price in the past four months, to \$72 a barrel?

Even the members of the Barron's Roundtable aren't completely immune, although a round of phone calls to our distinguished panelists in the past two weeks confirms they've contracted a less virulent strain. Many predicted at our Jan. 5 confab that the stock market, oversold and under-loved, was due for a major bounce. Now they think stock prices have overshot corporate fundamentals and a correction is in order, but

it won't take the Dow Jones industrials, the S&P and other market measures back to the March lows. That's because the economy could get a much-needed boost in coming months from the massive fiscal and monetary stimulus unleashed to support it.

Down the road many of our 10 investment experts fear there will be a bitter price to pay for today's spending, in the form of hyperinflation and a run on the dollar. Hence, their fondness for that great inflation hedge, gold. In the near term, alas, the only other corrective for the debt-fueled binge of the past decade would be a great cleansing of the economy and the markets, and that's not something politicians -- or the folks who elect them -- want to bear.

So, where does that leave us? With POSP, or plain-old stockpicking, as Mario Gabelli likes to call it. And in that, our panelists don't disappoint. The pages that follow are filled with their best investment ideas for the back half of 2009,

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Rachel Sandford

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