

So let's have a look at the portfolio. What we did is we got rid of XLK just about at the top and we reinvested in ACWX. So the allocation to equities is unchanged. Unfortunately, we never managed to get to HEWJ, which keeps on going up. So we will keep it in there for the time being just in case something happens, but we'll probably cancel it.

next week because it's unlikely to be filled. The broker statements are naturally updated, the monthly performance as well we're doing reasonably well. Just going back to the portfolio we did sell half of the STIP and put it into USFR and depending on NFP, we might get rid of. All of STIP and put it all into USFR or reverse that trade because as we explained to you, we think this NFP is actually going to decide between the 50s and the 25 in cuts.

We might even go into TLT because if the number is very weak. Then TLT is going to give us the convexity we need to make some money out of this. But all that will be in an email which we will send you if we need to send it to you on Friday after the NFP. And please cancel this order just before NFP.

There's no point in taking it through. I will actually write it down. please cancel before NFP because it really becomes too dangerous to have it over NFP. We think it's going to be a very seminal number. Otherwise, that's all I have for you. Thank you very much indeed and I will definitely send you an email on Friday immediately after NFP if it needs to be sent.

The first update for 2GB squared. How exciting. And here we have how much money there is in the account. The broker statement naturally is here. That's the first broker statement. We only have the one because there's no activity. So you can see exactly how much money is in the account. Now, there are two ways to start an account.

There's the let's buy the allocations immediately and there's let's do it bit by bit. I am going to go for the bit by bit simply because it's very foolhardy to do something to basically fill up the account just before NFP. I would rather do it after NFP. It's going to be far less dangerous. It could cost us money, it could save us money, but on the balance of probability, I think it would save us more money than it would cost us.

Therefore, I'm going to leave it until next week or after NFP. And the only thing I'm going to do is I'm going to sell two 24. So two contracts of the 5560 puts to Friday, the 6th of September. I'm not going to get very much for them, but there again, they are 2 percent away from at the money. And that is where I think value in equities.

potentially starts and even if the nfp is the kind of number that we speculated about i. e very weak i think i'll be able to buy them back with not too much damage and then in any case we'll have saved a whole load of money compared to actually starting allocating immediately now what is important is that you subscribe to the email and the update that comes via the email.

So let's have a look at the page and see what it looks like. I will be typing out the updates here, but if you put your email address in here, you will receive an email I'm not telling you that there is an update here. So let's say that immediately after I've seen the NFP number, I want to do some trades.

They will appear here. And every time I do an update, you will receive an email within a minute or so. Or even less. So it should be automatic. It should be extremely quick. And you should be able to follow what I do in real time. Having said that, let's have another look at what will be different in 2Gb2 on the Excel sheet.

Naturally, futures and options, but what I will be doing here underneath is I will be working out the leverage of the account. Naturally, there's no point in me doing it now because I have to. join up some cells. And since I have nothing in there, there's no point in starting now. But as from next week or soon after that, you will see a box here with the various leverages that I will have in each asset class.

So look out for that. And that is going to be the major difference. Otherwise, everything is the same. The order entry. Which naturally will be supplemented by the updates on the website that you hopefully will get emails on once you've had a look at how to do it. And the broker statements will be in exactly the same place as will be the monthly performance and the weekly chart performance chart.

So there's going to be absolutely nothing different from what you're used to already in 2 Great Beers original. It just remains me to wish you a very happy Labor Day weekend and the very best of luck to us all.