

Animal Spirits Episode 27: Micro Bubbles

On this week's Animal Spirits with Michael & Ben we discuss:

- Is it time for Sell in May blog posts to go away?
- By 2020 the top 10 most common ages in the U.S. will all be between 26 to 35.
- Will Millennials and HGTV cause the next housing bubble?
- Are tech stocks a micro bubble?
- What is the working definition of a bubble anyway?
- FANG stocks now make up almost 10% of the S&P 500.
- Amazon is amazing but we need to solve the problem of too many boxes.
- A cautionary tale about following your favorite star fund manager into an investment.
- Why scary retirement stats don't scare people into saving more.
- Why good news often goes unnoticed.
- Why fundamentals have driven most of the market's gains since 2010.
- How our parents shaped our views on personal finance and much more.

Listen here:

Stories mentioned:

- [U.S. demographics: largest 5-year cohorts and 10 most common ages in 2017](#)
- [Yes, it's a bubble. So what?](#)
- [What is a bubble?](#)
- [At Amazon, it's all about cash flow](#)
- [Amazon: Glimpses of Shoeless Joe?](#)
- [Copying Peter Lynch](#)
- [Come easy, go easy: The tech takedown](#)
- [Getting ready for the golden years](#)

Charts mentioned:

A Wealth of Common Sense

Personal Finance, Investments & Markets

Books mentioned:
<http://awealthofcommonsense.com>

- [One Up on Wall Street](#) and [Beating the Street](#), both by Peter Lynch
- [The Everything Store](#) by Brad Stone
- [The Fallen](#) by Ace Atkins
- [Drive](#) by Daniel Pink
- [Killers of the Flower Moon](#) by David Grann

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