From: US GIO <us.gio@jpmorgan.com>
To: Undisclosed recipients:;
Subject: Global Conference Call: Scenarios on US Fiscal Cliff & Asset Strategies : Tues, 8/7, 9amET
Date: Mon, 30 Jul 2012 20:58:49 +0000
Inline-Images: JPM_logo.gif; spacer.gif; email_alert_icon.gif; image001.png

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Headline: Global CC: Scenarios on US Fiscal Cliff & Asset Strategies : Tues, 8/7, 9amET

Author(s): Thomas J Lee, CFA, Katherine C Khor, Michael Feroli, Srini Ramaswamy, John Normand, Colin P. Fenton

Abstract:

- Investors appear paralyzed by the pending US fiscal cliff, understandable given both (i) enormous stakes (up to 5% of GDP or more) and (ii) uncertainty around timing of visibility. Our previous stance has been that the fiscal cliff is not relevant until late 2012/early 2013, but as we move through the second half of 2012, it matters.
- Please join us for a conference call to discuss what we view as the likely scenarios (around the fiscal cliff) and their assigned probabilities: that is, election outcomes and their effect on timeline.
- We have assembled our global asset strategists (Economics, Fixed Income, Foreign Exchange, Commodities and Equities) to discuss the implications for the respective financial markets under each scenario.
- Obviously, the global implications are enormous and can really only be properly analyzed from a multi-asset class view. It should be a very useful discussion.
- Hosted By:
- Thomas J. Lee, Chief U.S. Equity Strategist
- Also participating:
- Tom Block, founder Tom Block Consults and former Head of Government Relations for J.P. Morgan Chase(bio attached);
- Michael Feroli, Chief U.S. Economist;
- Srini Ramaswamy, Head of US Liquid Markets Strategy;
- John Normand, Head of Global FX Strategy;
- Colin Fenton, Chief Commodities Strategist.
- Details and specifics:
- Tuesday, August 7th, at 9:00am ET
- DIAL-IN: 800-857-9651 (US); +1-312-470-7357 (outside US); Passcode: STRATEGY
- Replay Through 8/14: 800-568-5428 (US); +1-402-344-6795 (outside US); Passcode: 8426. Replay available approximately one hour after the call ends.
- International Dial-in Details are available below:
- International Dial-ins:

Link: https://mm.jpmorgan.com/PubServlet?action=email&doc=GPS-907825-0.pdf

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