# FINANCIAL PREPAREDNESS

*"One of life's most painful moments comes when we must admit that we didn't do our homework, that we are not prepared." ~ Merlin Olsen*

Issue #236
August 22, 2025

## There Will Always Be an Englandstan

Recently I read that if there was an election in Britain tomorrow, the Reform Party would go from having five seats to 400, thus winning a huge majority. Normally, this would result in what's known as "geopolitical alpha," or excess positive return for equities in that country due to policies that were more favorable for free markets and shareholders. So I started taking a close look at the UK-based companies on my spreadsheet of ~2,500 dividend-paying stocks from around the world. What I discovered is that Britain is not a normal country, and these are not normal times.

In recent years I've written numerous times about the shocking, sudden takeover of corporations around the world by social justice warriors and woke asset managers. After perusing the corporate sustainability report of hundreds of companies and reviewing the membership lists of dozens of World Improver NGOs, it's difficult to convey just how broad and deep this takeover has been, including in the U.S. It's a miracle that someone like Donald Trump was able to get elected when at least 95% of Corporate America is dominated by management that is hostile to his views.

The MAGA/MAHA/America First/libertarian/anti-mass immigration coalition somehow stopped the powerful and well-funded UN/WEF/elite juggernaut at the last possible moment before the world was plunged into permanent tyranny, though it will take a herculean effort over many years to undo the mess and brainwashing that has accumulated over the last three decades.

In the meantime, despite successful pushback in countries such as the U.S., Argentina and Hungary, the barbarians are no longer at the gate, they're in the C-suite, and they have been plundering (or "mobilizing capital" as they would say) over 95% of companies for the benefit of a range of "stakeholders." Shareholders will get whatever is left over, which is the same thing that the proletariat will own when the World Economic Forum runs the world: nothing. Eventually, investors will figure this out, but for now, they operate under the fatal assumption that today's companies are managed for their benefit. They are not, not even close.

Anyway, as I perused the slick, voluminous, and inexplicable sustainability reports of UK-based corporations, I came to a firm conclusion: Generally, their management is the most shameful, willfully ignorant, self-delusional, groveling, self-debasing, propaganda-amplifying, tyranny-enabling, suicidal (both financial and cultural), cucked simps in the world. The thousands (yes, thousands!) of references to the keywords that I look for when searching corporate sustainability reports reveal that management is *obsessed* with ESG and couldn't care less about generating free cash flow and dividends for shareholders.

For example, easyJet (a British airline) says: "Our destination is net zero....easyJet's operations are negatively contributing to climate change....We're also investing millions of pounds...to accelerate the development of hydrogen-powered aviation and carbon capture technologies--which will remove carbon emissions from the air and store them safely and securely underground. [As if carbon dioxide was toxic waste instead of the gas that plants breathe.] Our relentless commitment to reduce the carbon footprint of everyone we fly, because flying contributes to climate change." Either easyJet's management somehow doesn't realize that this will lead to corporate (and civilizational) suicide, or they don't care (because they'll be retired with their pile by then).

The 10-year average annual return on invested capital for these über-woke companies support my hypothesis, as they are generally in the low single digits—enough to remain solvent but not nearly enough to reward shareholders for bearing the risk. As a (skeptical and cautious) equity investor, reading through this rubbish (as they would say in the UK) is both bewildering and frightening, so does nothing to animate any investor's animal spirits.

Even if the Reform Party won a landslide election, how would these companies suddenly pivot to a more free market atmosphere after spending years publishing corporate sustainability reports, making ridiculous statements like, "Sustainability isn't just critical to our success, it has been embedded in our DNA since the company's founding and is central to our mission," and promising to get to Net Zero by 2030? Generally, people want to appear to be *consistent*, even at great cost.

In 1990, Sinead O'Connor released an album that included the song "Black Boys on Mopeds," which included these lyrics:

*England's not the mythical land of Madame George and roses*
*It's the home of police who kill black boys on mopeds*
*And I love my boy and that's why I'm leaving*
*I don't want him to be aware that there's*
*Any such thing as grieving*

I've long admired the voices of waify British and Irish minstrels, so the muses have inspired me to update the verse above to modern times:

*England's not the mythical land of free cash flow and dividends*
*It's the home of CEOs who kill their companies*
*And I love my capital and that's why I'm leaving*
*I don't want it to be aware that there's*
*Any such thing as losses*

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