

MuhlenkampMethods

For the Intelligent Investor

Answers to questions you may not even know you have.

Ron's Summer Reading List for 2026

by Ron Muhlenkamp

I've been following the topics of politics and climate change for over forty years, and I've wondered how people come to the opposite conclusions when looking at the same data. I have found a few authors that have helped me understand this phenomenon, and I offer them to you as a way of sharing useful resources and ideas that you may not have come across.

Thomas Sowell and Jonathan Haidt offer rational explanations as to why intelligent and caring people can come to opposite conclusions on a wide variety of topics. These conclusions then feed into differing political viewpoints. The books listed here provide insight and understanding.

The "Climate Change" authors I list have seen their thinking on climate change evolve over time. Each started as an "environmentalist" and shared the common conclusions regarding man-made climate change; but each of them has come to differ from the consensus in useful and interesting ways. It's not about people being ignorant (although there is some of that); it's about data selection, confirmation bias, setting priorities, etc.

And finally, Toby Rice of EQT offers a look at environmentalism from the viewpoint of producing the energy we need to support and sustain modern civilization. He makes a rational argument for how we can do both.

To understand the difference between Conservatives and Progressives, read:
<i>A Conflict of Visions: Ideological Origins of Political Struggles</i> , by Thomas Sowell
<i>The Righteous Mind: Why Good People Are Divided by Politics and Religion</i> , by Jonathan Haidt
To understand climate change science, read:
<i>Fake Invisible Catastrophes and Threats of Doom</i> , by Patrick Moore
Dr. Patrick Moore was one of founders and former board member of Greenpeace Canada.
<i>Unsettled: What Climate Science Tells Us, What it Doesn't, and Why It Matters</i> , by Steven Koonin
Dr. Steven Koonin held the position of Under Secretary for Science at the U.S. Department of Energy under President Barack Obama. He served from May 2009 until November 2011.



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Apocalypse Never: Why Environmental Alarmism Hurts Us All, by Michael Shellenberger

Mr. Michael Shellenberger was named Hero of the Environment – Leader and Visionary by TIME Magazine in 2008.

False Alarm: How Climate Change Panic Costs Us Trillions, Hurts the Poor, and Fails to Fix the Planet, by Bjorn Lomborg

Dr. Bjorn Lomborg has been active in the climate debate since the 1970s. In 2004, he was named one of TIME Magazine's 100 most influential people in the world today.

Climate at a Glance (Second Edition): Facts on 40 Prominent Climate Topics, by Anthony Watts and James Taylor

The authors organize this book into four sections and use 1-2 pages to provide data and explain it for each of the 40 prominent climate topics.

CO2Coalition.org - Gregory Wrightstone, Executive Director

The CO2 Coalition was established in 2015 as a 501(c)(3) for the purpose of educating thought leaders, policy makers, and the public about the important contribution made by carbon dioxide to our lives and the economy.

To understand an energy producers take on environmentalism, read:

Unleashing U.S. LNG – The Largest Green Initiative on the Planet by Toby Z. Rice

Mr. Toby Rice is the President and CEO of EQT Corporation, the largest producer of natural gas in the U.S. His presentation can be found at <https://www.eqt.com/responsibility/unleashing-us-lng>

