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Howard Marks is chairman of Oaktree Capital, which manages almost $80 billion in assets. He pens a monthly letter, and this past month, he wrote a thoughtful discussion of the arguments for and against gold. As more investors than ever flock to gold via SPDR Gold Shares (NYSE: GLD) and other gold ETFs, it's worth your time to hear out the arguments. Afterwards, if you're interested in learning more, Foolish gold aficionado Chris Barker has a list of the top 10 gold and silver stocks for 2011, which includesTaseko Mines (AMEX: TGB), Yamana Gold (NYSE: AUY), and Gammon Gold (NYSE:GRS).

Short: CAPS' Weekly Top Stock Idea:- Shameless plug. Each week, I cull a top stock idea from the pitches made on CAPS, The Motley Fool's 170,000-member free investing community. Last week's pick was Colgate-Palmolive, but there's been a variety of stock ideas with a full write-up for each. If you're interested, you can subscribe to the series' RSS feed here, or follow on Twitter here. You can also see an archive of all the articles here.

Long: "Bruce Berkowitz: The Megamind of Miami" Fortune has a great profile of Bruce Berkowitz, the founder and manager of the Fairholme Fund (FAIRX). Bruce was recognized last year by Morningstar as the U.S. stock manager of the decade. He has made a name for himself by producing an average annual return of 11.6% over the past decade, during which the S&P 500 only rose 0.7% on average. He has done this by running a fairly concentrated portfolio and by taking large positions in companies where he sees value but where other investors are afraid to tread. Good examples of this include AIG, Citigroup (NYSE: C), and The St. Joe Company (NYSE: JOE). Bruce also looks to move Fairholme more toward investing in distressed debt, as he sees a large wave of corporate restructurings coming. This has so far worked out well for the fund, with its large distressed debt position in General Growth Properties (NYSE: GGP) having produced a monster profit. Click here to read his profile.

The best for last: Harry Potter and the Methods of Rationality:- No matter if you are a fan of Harry Potter or never read it, Harry Potter and the Methods of Rationality is a must-read and the best thing I've read in 2010. This work-in-progress book, currently 63 chapters, uses Harry Potter to teach lessons in rationality, with each chapter devoted to one aspect of the subject. (For fans, Harry's Aunt Petunia married a scientist instead of Vernon Dursley, and Harry grows up to be a rational scientific prodigy.) While you may roll your eyes, I hope you give the book a chance; everyone I've passed it onto has become hooked. The author of the story is Eliezer Yudkowsky, an AI researcher and expert in decision sciences and rationality, and he's writing it to stay sane as he also works on a textbook on rationality. Click here to read Harry Potter and the Methods of Rationality it's my Christmas present to you, the reader. Enjoy!

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