



**MACROVoices**  
with hedge fund manager Erik Townsend

## Research Roundup - February 1, 2018

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### This Week's Podcast:

1. Art Berman: Crude Oil Special Double Header: [\[Click Here\]](#)
2. Transcript of the Podcast Interview between Erik Townsend and Art Berman: [\[Click Here\]](#)

### In support of This Week's MacroVoices Podcast:

1. Art Berman Chart Book MacroVoices 31 January 2018: [\[Click Here\]](#)
2. Patricia Hemsworth MACRO VOICES - February 1, 2018: [\[Click Here\]](#)

### Written by Our Listeners and Past Guests:

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1. Jeffery Snider: (Chicken) Hawkish: [\[Click Here\]](#)
2. VARIANT PERCEPTION: FIG LEAVES FOR RAISING INTEREST RATE: [\[Click Here\]](#)
3. Jesse Felder: Amazon Adds a McDonald's In Market Cap in The Month of January: [\[Click Here\]](#)
4. Kevin Muir Macro Tourist - FED'S BALANCE SHEET PROMISES: [\[Click Here\]](#)
5. Convexity Maven Harley Bassman: It's Never Different This Time: [\[Click Here\]](#)

### Other Interesting Research we found for you in this issue:

1. "This Is 1987": Some "Haunting Math" On Today's GDP Number from David Rosenberg: [\[Click Here\]](#)
2. Pimco: It's time to start betting the other way: [\[Click Here\]](#)
3. Oaktree: Latest memo from Howard Marks: Latest Thinking: [\[Click Here\]](#)
4. The Telegraph: China promises bank rescue in next crisis as market prophets warn on rising US rates: [\[Click Here\]](#)
5. Ambrose Evans-Pritchard - World finance now more dangerous than in 2008, warns central bank guru: [\[Click Here\]](#)
6. Bloomberg - Bridgewater Triples Bets Against Italian Firms to \$3 Billion: [\[Click Here\]](#)
7. Jared Dillian: There Won't Be Three Rate Hikes This Year: [\[Click Here\]](#)
8. oilprice.com: Why Natural Gas Prices Just Tanked: [\[Click Here\]](#)

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