



MACROVoices
with hedge fund manager Erik Townsend

Research Roundup - May 10, 2018

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This Week's Podcast:

1. Charles Gave: Our Industry is NOT prepared for secular inflation!: [\[Click Here\]](#)
2. Transcript of the Podcast Interview between Erik Townsend and Charles Gave: [\[Click Here\]](#)

In support of This Week's MacroVoices Podcast:

1. Post Game Chart Book - May 10, 2018: [\[Click Here\]](#)
2. Big Picture Trading - How to use Options Like Warren Buffett Webinar: [\[Click Here\]](#)
3. Gavekal Research: [\[Click Here\]](#)
4. Charles Gave: A Different Analytical Approach: [\[Click Here\]](#)
5. Charles Gave: Portfolio Construction In The Time Of An Inflationary Reserve Currency: [\[Click Here\]](#)
6. Charles Gave: Ready For A Further PE Derating: [\[Click Here\]](#)
7. Charles Gave: The Upcoming Monetary War With Gold As An Arbiter: [\[Click Here\]](#)

Written by Our Listeners and Past Guests:

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1. Charles Gave Reveals A New, "Flashing Red" Warning: "I Expect A Financial Accident To Occur": [\[Click Here\]](#)
2. Stoking the Embers of Inflation: [\[Click Here\]](#)
3. VARIANT PERCEPTION: CZK: PAUSING FOR BREATH: [\[Click Here\]](#)
4. Jesse Felder: BANG: Why The Gold Miners Could Soon Make FANG Look Tame: [\[Click Here\]](#)
5. Jeffrey Snider: Suggestions of Risk In Consumer Credit: [\[Click Here\]](#)
6. \$100 Oil? Bank Of America Is Proud To Be First To The Party When It Comes To Suggesting Triple-Digit Crude May Be Coming: [\[Click Here\]](#)
7. Kevin Muir Macro Tourist - PUSHING AGAINST THE BIG WAVE: [\[Click Here\]](#)
8. Kevin Muir Macro Tourist - EM BANDWAGON: [\[Click Here\]](#)

Other Interesting Research we found for you in this issue:

1. Gundlach Live Webcast: "Is A Recession Coming?": [\[Click Here\]](#)
2. Nomura: Markets Are Jumping Due To A Violent Squeeze And An Inflationary "Force-In": [\[Click Here\]](#)
3. Home Capital predicts record surge in mortgage renewals as it reports drop in profit: [\[Click Here\]](#)
4. The World's Biggest Hedge Fund Derisks Massively, Goes Short Stocks: [\[Click Here\]](#)
5. Third Point's Loeb Joins Dalio On 'The Short Side': "Companies Are Going Down": [\[Click Here\]](#)

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