



MACROVoices
with hedge fund manager Erik Townsend

Research Roundup - August 2, 2018

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2. Transcript of the Podcast Interview for this episode: [\[Click Here\]](#)

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4. Jesse Felder: It's More Than Just FANG Stocks Investors Should Be Worried About: [\[Click Here\]](#)
5. Jesse Felder Chartbook July 31 2018: [\[Click Here\]](#)
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Written by Our Listeners and Past Guests:

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1. Seth Levine: Playing For A Potential Yield Curve Inversion: [\[Click Here\]](#)
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3. Jeffrey Snider: Why Hysteria Died, In One Day: [\[Click Here\]](#)
4. Kevin Muir Macro Tourist - THIS IS NOT EVEN CLOSE TO A REAL JGB CRISIS: [\[Click Here\]](#)
5. Kevin Muir Macro Tourist - QT VS. FOMC DRIFT: [\[Click Here\]](#)
6. Kevin Muir Macro Tourist - YIELD-CURVE-APOLOGISTS: [\[Click Here\]](#)
7. Indian Economic Update - Macro Matters - Part 1: [\[Click Here\]](#)

Other Interesting Research we found for you in this issue:

1. JPMorgan: QE Might Have Devastating Consequences After All: [\[Click Here\]](#)
2. Kolanovic: A Recession In 2019? Kolanovic Warns There Is One Event That Could "Finish Off The Cycle": [\[Click Here\]](#)
3. Nomura: 3-Day Blowout In "Value/Growth" Is Biggest Since Lehman Bankruptcy: "A 4.3 Sigma Event": [\[Click Here\]](#)
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6. The Heisenberg: Things Just Got Worse For Turkey As U.S. Said To Ready Sanctions, Lira Heads To No Man's Land: [\[Click Here\]](#)
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