



**MACROVoices**  
with hedge fund manager Erik Townsend

## Research Roundup - November 29, 2018

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Welcome to the MacroVoices Research Roundup, a free compilation of interesting investment research from your friends at MacroVoices. We never intend to SPAM anyone, and there is a safe-unsubscribe link at the bottom of this message if you don't want to receive future mailings. But before you opt out, please note we'll never send you marketing or sales literature - this e-mail distribution list is for worthwhile content distribution only!

### This Week's Guest: **Julian Brigden** Secular Bond Bear Doesn't Preclude Significant Rallies

Erik Townsend and Patrick Ceresna welcome Julian Brigden to MacroVoices. Erik and Julian discuss:

- What is driving the bond market right now?
- Is it all about demographics?
- The global excesses in the equity markets
- Are the U.S. housing markets overpriced?
- Where is the next trade in treasuries?
- Putting on the steepener
- Is the stock market due for a big bubble bounce?
- Inflation considerations in 2019
- What is the next move for the Fed?



Listen to this week's podcast: [\[Click Here\]](#)

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

View the entire article in your browser at: [www.macrovoices.com](http://www.macrovoices.com)

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

1. Julian Brigden Chart Book November 2018: [\[Click Here\]](#)
2. 50% off Real Vision - Macro Insiders: [\[Click Here\]](#)
3. Big Picture Trading Chart Book November 29: [\[Click Here\]](#)

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Early Bird Phase 1 – Ends November 15<sup>th</sup>

Early Bird Phase 2 – Ends December 15<sup>th</sup>

Saturday January 19<sup>th</sup>, 2019  
**Vancouver, Canada**

Register now at [www.macrovoices.com/live](http://www.macrovoices.com/live)

- **Beyond Blockchain** - The Death of the Dollar and the Rise of Digital Currency. Erik Townsend's new book - Chapter One Preview: [\[Click Here\]](#)
- **Big Picture Trading** - 7-Day Free Trial Link: [\[Click Here\]](#)

## Written by Our Listeners and Past Guests:

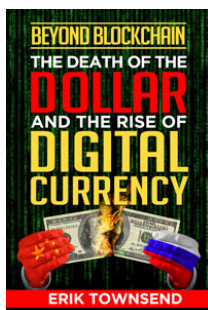
This section of the Research Roundup is intended to showcase articles *written by our regular listeners and our past guests*. Just send us your submissions via e-mail to [researchroundup@macrovoices.com](mailto:researchroundup@macrovoices.com). Provided that our screening team agrees your submission is not advertising or SPAM, we'll include it in a future RR email.

1. Jesse Felder: The Fed Warns The 'Drop In Asset Prices Might Be Particularly Large': [\[Click Here\]](#)
2. VariantPerception: SWEDISH HOUSING MARKET STARTING TO CRUMBLE: [\[Click Here\]](#)
3. Kevin Muir Macro Tourist: TRYING TO SAVE THE ECONOMY WITH LOWER OIL: [\[Click Here\]](#)
4. Kevin Muir Macro Tourist: A HISTORY OF FIRST CUTS: [\[Click Here\]](#)
5. Corporate Spreads And Yields Are Now At Multi-Year Highs: [\[Click Here\]](#)
6. Jeffrey Snider: They Warned Us: [\[Click Here\]](#)

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

1. 'The Crown Prince Is Out Of Control': U.S. Senate At Wits' End With Saudis, Yemen War: [\[Click Here\]](#)
2. Fed points to december rate hike but is worried about tariffs and debt: [\[Click Here\]](#)
3. Rising Rates Are Killing The Housing Market: [\[Click Here\]](#)
4. Trump Scraps Putin Meeting at G-20 Over Russia's Ukraine Strife: [\[Click Here\]](#)
5. Goldman sachs contradicts trump 50 oil is bad for the us: [\[Click Here\]](#)

## Beyond Blockchain - The Death of the Dollar and the Rise of Digital Currency:



### [Check out Erik Townsend's new book!](#)

The cryptocurrency trend of the past few years has continued to grow despite widespread predictions that it would just be a flash in the pan. Blockchain is suddenly everyone's favorite buzzword. But what if there's more to this story than meets the eye? What if Digital Currency is about to change the world in ways beyond our imagination? *And what if geopolitical forces our politicians don't even understand have already inspired China and Russia to use Digital Currency to attack the U.S. Dollar's dominance over the global financial system?*

Erik covers these subjects and more in his recently published book. Please visit [www.macrovoices.com/bb](http://www.macrovoices.com/bb) for more information and to order the paperback, Kindle, or

audiobook.

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