Twitter Thread by John Tuld - Lockdown Informer



John Tuld - Lockdown Informer
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Alright. I've got that out of my system. Happy Thanksgiving and back to work here with a Early Black Friday pallet cleansing mega thread with a Cornucopia of thoughts on 2021. First, precious metals aren't dead. Yes, Bitcoin is stealing gold's thunder as a... /1

...currency alternative but it's not going away as a dollar hedge though I see Bitcoin likely to outperform gold in 2021. That said, gold could be up over 50% by the end of next year as Yellen and Powell (Jack and Jill) are climbing the stimulus hills. Meanwhile.. /2

...silver really should kill it next year. Solar is heating up, not just with Biden's win, but globally, & with pent up demand unleashed as lockdowns either relax or get tossed aside via polite revolts. Industry is going to boom and with globalists back in business so are... /3

...green energy and rare earth metals. Yeah, looking at you $MP on rare earths and - dare I say it - $AG and miners might have their year come summer of 2021. Specs are going to sniff that out in January so look for December tea leaves on the metals. No shame in buying $SLV... /4

....but I really like playing options for it. Speaking of lockdowns, no I promised to behave, I think the by-product of lockdowns ending is that the torturous path of a decade plus of "deflation" (in name only really) dies in a supernova heat death of feels good man spending. /5

That means Powell & Yellen quickly pivot to dark thoughts of actually reversing course on rate hikes late next year as double digit inflation looms yet being paralyzed by pride..I mean politics as the Death of the Dollar finally sinks in with the last people left on earth to.. /6

..embrace what we've all known for years. Add in the LIBOR rate reset for next year, globalist calling for a global reset that will lead to MMT instead of the actual cancellations of middle class debts, & you have the makings of an inflaitonary disaster in 2022. It's a view... /7

...I've wished to be both vindicated on and yet continually wrong due to fact our world is going to be somewhere between "better than Mad Max" but worse than "1930s Dust Bowl." I've long underestimated the Fed's ability to play monetary musical chairs, however... /8

..it looks like the bill is quickly coming due in 2021. Where is the big play? Feels like gold & silver miners. Yeah, I said it. I hate them right now, but there's a leveraged upside play when the metals move AND the public's imagination is captivated (think 2010)... /9

I think we finally get the follow through in miners in 2021 as silver cracks $30. What about stocks? They'll do fine but not as well as pm's. That doesn't mean that crypto plays like $OSTK won't rocket higher should one of their crypto subsidiaries do well. Also watch bonds. /10

They'll be protected, like stocks, at all costs but can they? Can central banks print that much money and keep confidence in the Dollar's reserve status now that everyone is looking around doubting? We'll see. /11