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KEY TAKEAWAYS



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CHIGRL'S KEY TAKEAWAYS

1. Josh Spoke about the Bullishness in the LNG Industry in Business that is not yet being Reflected in the Capital Markets.

I asked about Warren Buffett's recent 50% stake in Cove Point LNG facility, he said clearly Warren sees value in global energy supply.

2. On Canadian LNG

Josh says that First Nations really want this expansion, pipelines (or the lack of) is the biggest problem for Canada right now.

3. Thomas Has Been Bullish Nat Gas/LNG gor a While Now

He talked about how LNG is the perfect bridge fuel with limited environmental impact as EM's move from coal to natural gas.

4. On Canadian LNG

He says the political landcape needs to change in order for Canada to become a major player.

5. The "Invisible Hand" in the Markets

Using ideas from Peter's new book <u>"The Confidence Map: Charting a Path from Chaos to Clarity"</u> we talked about why confidence is the real "invisible hand" in the markets. On last year's hysteria in the energy markets after the Russian invasion of Ukraine, he says that panic is unsustainable and after levels of mania exhaust, we then see dramatic lows (this was most notable in nat gas/LNG).

6.Right now we are seeing intense disinterest in hard assets with mania in abstraction like AI, Peter mentioned.

6. Right Now we are Seeing Intense Disinterest in Hard Assets with Mania in Abstraction like AI, Peter Mentioned.

7. Commodities are a Vulnerability Trade

Right now the nat gas market participants are seeing excess (whether true or not).

8. Josh Spoke about his New Company Abaxx Exchange

Abaxx exchange focuses on three pillars: Eastern markets as supply is moving eastward), physical exchange (rather than financial or cash settled contracts), and technology.

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CHIGRL'S KEY TAKEAWAYS

9. Gold/Energy Correlation

Josh is also a gold guy, so I had to ask about gold. He talked about the gold/energy correlation. Demand is up for collateral that is not just US Treasuries, why we see CB's buying gold.On a BRIC gold currency, he just does not see it anytime soon as the mechanisms are not in place at this point.

10. Energy Density

Thomas then spoke about energy density, LNG is the natural next step away from coal. US is by far best positioned as a global supplier. He likes US nat gas/LNG equities for this reason.

11. Hear Me Now Markets

Peter talked about "hear me now markets" 0 DTE options are a great example of this. On commodities, he spoke about nationalization and that right now we are in a moment of complacency. He also spoke about buy signals in the LNG market.

12. Final Thoughts

Josh: "Be like Buffett" (do not chase liquidity) We are in a period of volatility after years of no volatility due to CB's low rate, QE environment.

Thomas: Energy fintwit is dominated by oil, there is a lot of opportunity in nat gas where most are not looking. He is is also bullish battery metals and gold and silver.

Peter: Local vs Global: Think of energy as country specific trades rather than global (as far as investing).

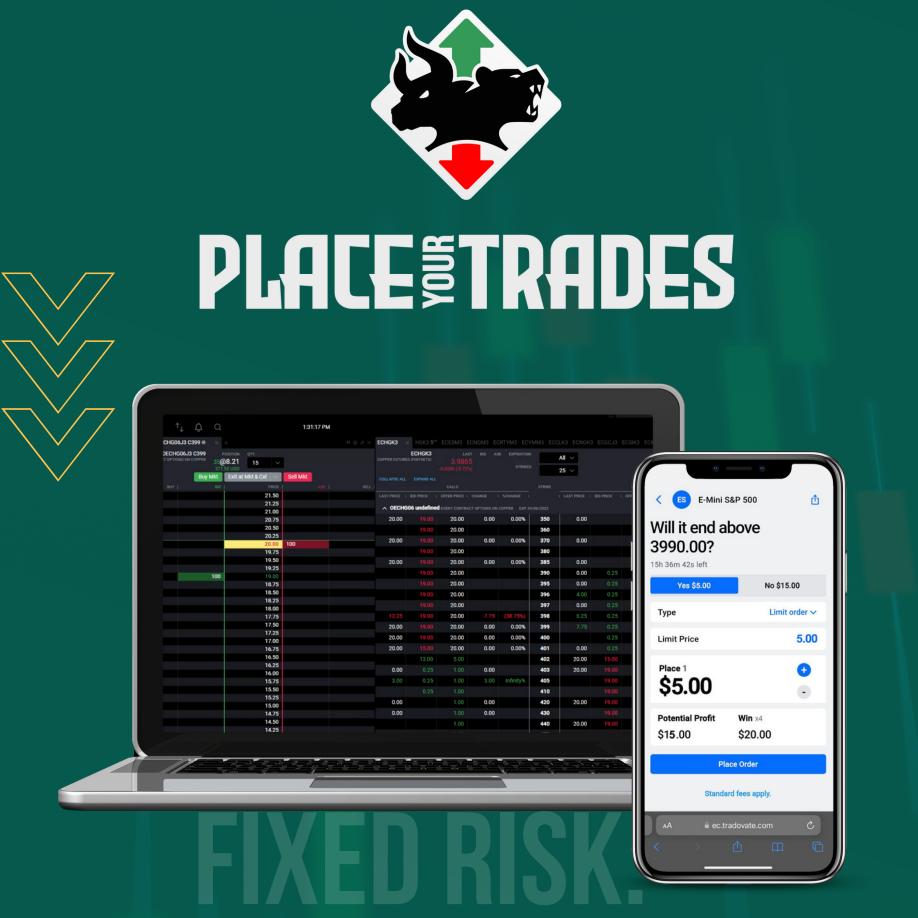
There Was so Much More in this Episode, I Encourage You to Listen to it in its Entirety if You Have Time!

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