

PLACE YOUR TRADES SPACES **HOSTED BY CHIGRL**

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# PLACE YOUR TRADES

## KEY TAKEAWAYS

PLACE YOUR TRADES

## AGRICULTURE, METALS, ENERGY

08.09 @ 11am EST



**Special Guests:** Marin Katusa and AG Bull Media!

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# CHIGRL'S KEY TAKEAWAYS

## 1. Marin on Mining Equity Finance

Marin spoke about mining equity finance being at the very low end of the last 15 years. It is about picking your geopolitical risk and massive CAPEX needed. He spoke about uranium Africa as an example.

## 2. On Mining Gold

Highest grade operating gold mine is in the world. There are incredible opportunities in safe jurisdictions using modern technologies.

## 3. Chile Changing Lithium Mining Rules

He spoke about Chile changing lithium mining rules for foreign companies, Chilean government will need to own 50% of mines. ALB and SQM looking to expand elsewhere i.e. Canada.

## 4. North American Mining

He is a big fan of North American mining, although permitting is still an issue and will only get worse all of that is bullish for those that are already producing.

## 5. Tommy on Geopolitical Risk

Tommy talked about geopolitical risk in the agriculture sector particularly with Russia/Ukraine and things are escalating. Cost of capital is also having a paradigm shift because of cost of capital because of rising rates. Business models are being spoiled right now. Cost of capital for farmers is now 9-11%

## 6. Grain Spikes Creating Problems in the Markets

Grain spikes on geopolitical risks are creating huge problems in the markets. Since crude oil went negative in 2020, it has changed the commodity markets dynamics, risk profile and tolerance has changed.

## 7. Food Inflation

Food inflation is here to stay, even if prices of the actual commodities are down it is all in the processing, labor, etc. Economics have shifted and having a dynamic affect on ag markets.

## 8. CB Raising Rates

He also talked about the fact that CB's raising rates is making people poor, fuel inflation and food inflation: the poor have never been as poor as they are today.

## 9. Marin on Innovations in Bear Markets

Innovations happen in bear markets and you fund the innovation in bull markets. New technology will help increase yields in ags and in mining increase your metallurgy.



# CHIGRL'S KEY TAKEAWAYS

## 10. Consolidation in the Industry

He believes there will be a lot of consolidation in the industry. The big boys will hedge out the little guys. Used uranium companies as an example. We are not going to run out of metal, but government take is going to increase as well as cost of capital, you you have to be very careful where you are looking to invest.

## 11. The Uranium Sector

He spoke about the uranium sector. Kazakstan, Namibia etc. Too much geopolitical risk. North America better.

## 12. On New Technologies:

He spoke about the mining company he owned in Canada , mining is still pretty archaic, bringing new technology to old mines is innovating the industry.

## 13. On Carbon Capture:

In Texas there is a land rush for CCUS, he is an investor in the sector. Governments are legislating this and companies are investing millions particularly oil companies. So, it is happening.

## 14. Governments are creating a bid for metals, great for mining right now

## 15. Tommy on the Job of the Markets

Job of the markets is produce the most goods spending the least amount of money with the most technologies. Weak are going to be weeded out again.

## 16. Largest Black Swan Event

Greatest headwind, largest black swan event for agriculture is fertilizer risk, so keep an eye on that. Access to and cost of fertilizer as well as cost of production for fertilizer.

## 17. Policies in the Netherlands and New Zealand

I asked if policies in the Netherlands and New Zealand are coming to the US. He said it a question of when not if and stressed the importance of reaching out to your elected officials. Your officials work for you and fight for whats right but do not let it bankrupt you he said.

## 18. Final Thoughts

There was so much more in this episode, so I encourage you to listen to it in its entirety, but if do not have time, at least catch the last 10 minutes for final thoughts!



# CHIGRL'S KEY TAKEAWAYS

**Plus a whole lot more!!  
If you have the time, I recommend  
listening to the whole episode! It was fantastic!**

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