

Aurum Echo Premium – January 2021 edition

Hope you're well and find some of the ideas following of use.

At last, the end of 2020, time to think asset allocation for 2021.

There is not a real need to revisit the financial events of the 2020 year, they're covered here: www.aurumecho.com

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Investors must face the prevailing fact that, despite obvious distortions/valuations, market accommodation is now guaranteed.

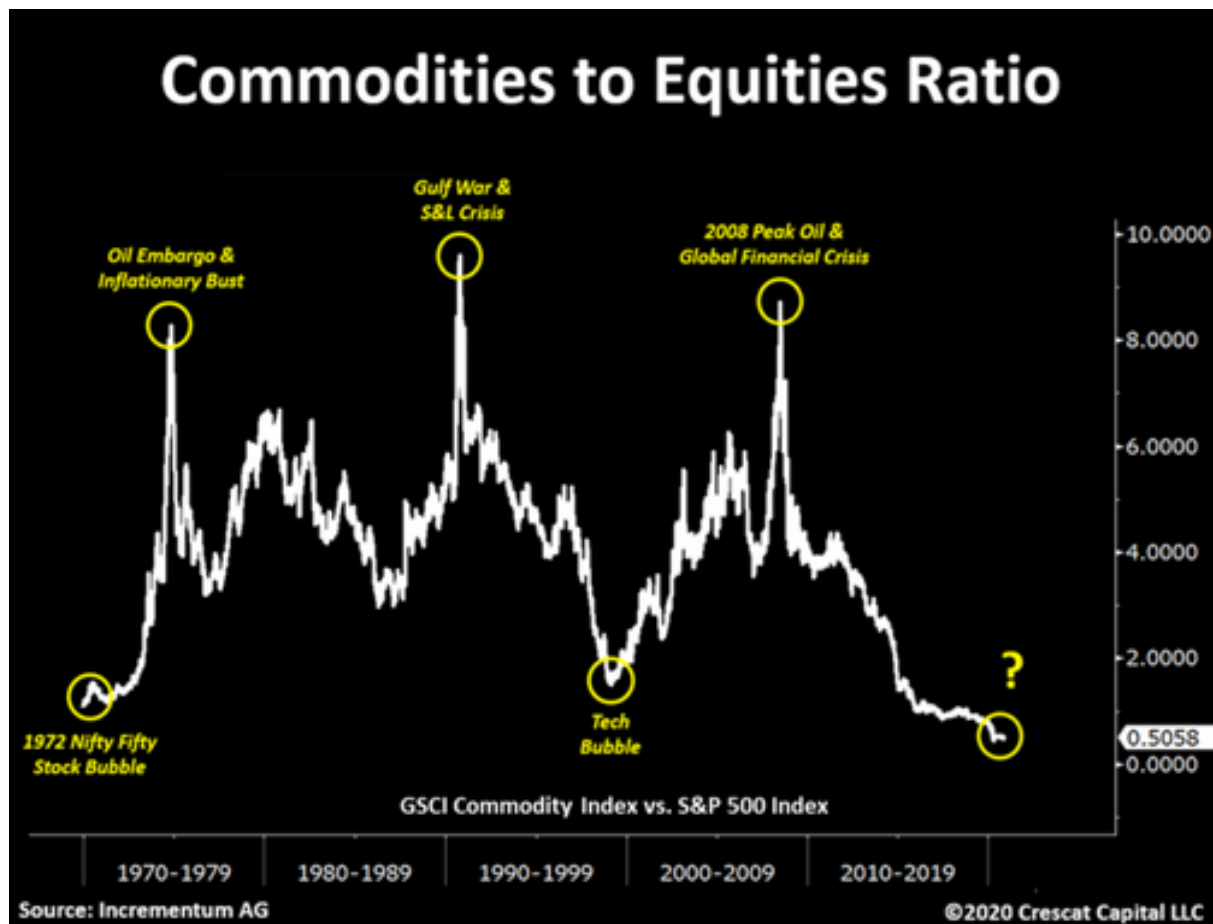
Under the guise of “full employment and target inflation”, Central banks are going to support until either employment/inflation targets are met and now they’ve teamed up (officially) with governments to co-ordinate efforts to this end.

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Commodities (ex precious metals)

One group that stands to greatly benefit from all things being green (EV's) are certain metals of the periodic table, including copper, nickel, alumina, cobalt, lithium, cadmium and lead. Other “rare earths are also in short supply!
Never hurts to review a periodic table

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Precious Metals (mainly gold)

- Shall we start with inflation hedge?
- Like some currency de basement with that?
- How about 18 trillion dollars of negative yielding paper?
- Interest rates holding at all time (in recorded history) low?
- If that's not enough, just imagine what the price might look like should the powers that be include it in the "reset" basket?

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Crypto World

Many Crypto currency enthusiasts compare blockchain technology discovery to that of electricity!

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There have been some very smart analysts (James Aitken and Co) that have been recently commenting on seeing some heavy institutional footprints on the BTC tape in recent times.

Some more participation from them and a healthy FOMO dose should keep BTC very interesting into 2021.

International and Emerging Markets

Strongly reviewing for a 2021 entry point.

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