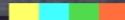


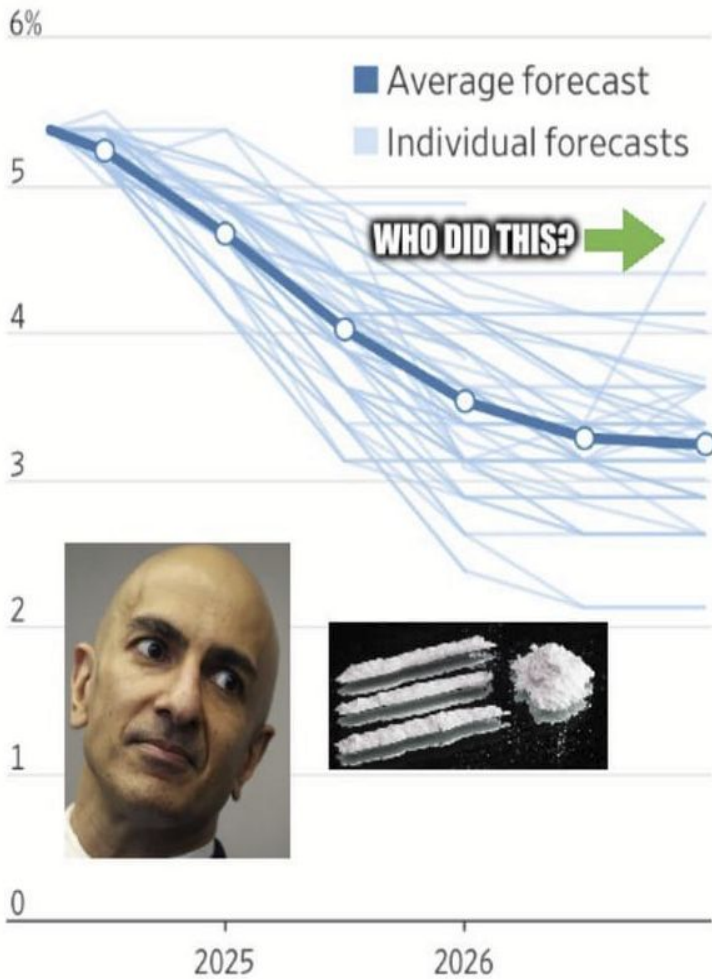
Khans Kaffeerunde



21.04.2024



Federal-funds rate forecasts



Markt generell



If you made \$500,000 per day, every single day since the Great Pyramids were built, you would have less than half of what the US govt has borrowed since June.

Charts

Earnings Announcements - Week of April 22

Monday, April 22		Tuesday, April 23		Wednesday, April 24		Thursday, April 25		Friday, April 26
Before Market	After Market	Before Market	After Market	Before Market	After Market	Before Market	After Market	Before Market
verizon	cādence	PEPSICO	TESLA	ThermoFisher SCIENTIFIC	Meta	MERCK	Microsoft	ExxonMobil
TRUIST	NUCOR	NOVARTIS	VISA	AT&T	IBM	AstraZeneca	Alphabet	abbvie
SANDVIK	Ameriprise Financial	DANAHER	TEXAS INSTRUMENTS	BOEING	servicenow	CATERPILLAR	VESTA	Chevron
Kaspi.kz	Brown & Brown INSURANCE	GE Aerospace	CHUBB	Boston Scientific	Lam RESEARCH	COMCAST	T Mobile	totalEnergies
Albertsons Companies	ALEXANDRIA	PHILIP MORRIS INTERNATIONAL	CN	GENERAL DYNAMICS	WM WASTE MANAGEMENT	intel.	HCA Healthcare	
ZIONS	PCA PACKAGING CORPORATION OF AMERICA	Raytheon Technologies	CoStar Group	CME Group	CHIPOTLE	S&P Global	KLA	COLGATE
Bank of Hawaii	MEDPAC	ups	Baker Hughes	Hilton	O'Reilly AUTO PARTS	Honeywell	GILEAD	AON
	els	SHERWIN-WILLIAMS	Equity Residential	Biogen	Ford	Keurig DrPepper	Capital One	ROPER
	CRANE	Spotify	Steel Dynamics	Humana	align	Southwest	Snap Inc.	Charter COMMUNICATIONS
	Globe Life	gm general motors	SEAGATE	Hasbro	UHS	American Airlines	ROKU	lyondellbasell



Mon	Apr 22	3:15am	CNY	1-y Loan Prime Rate
			CNY	5-y Loan Prime Rate
		5:30pm	EUR	ECB President Lagarde Speaks
Tue	Apr 23	9:15am	EUR	French Flash Manufacturing PMI
			EUR	French Flash Services PMI
		9:30am	EUR	German Flash Manufacturing PMI
			EUR	German Flash Services PMI
		10:00am	EUR	Flash Manufacturing PMI
			EUR	Flash Services PMI
		3:45pm	USD	Flash Manufacturing PMI
			USD	Flash Services PMI
		4:00pm	USD	New Home Sales
			USD	Richmond Manufacturing Index
Wed	Apr 24	10:00am	EUR	German ifo Business Climate
		2:30pm	USD	Core Durable Goods Orders m/m
			USD	Durable Goods Orders m/m
Thu	Apr 25	2:30pm	USD	Advance GDP q/q
			USD	Unemployment Claims
			USD	Advance GDP Price Index q/q
		4:00pm	USD	Pending Home Sales m/m
Fri	Apr 26	1:30am	JPY	Tokyo Core CPI y/y
		Tentative	JPY	BOJ Policy Rate
		Tentative	JPY	Monetary Policy Statement
		Tentative	JPY	BOJ Outlook Report
		Tentative	JPY	BOJ Press Conference
		10:00am	CHF	SNB Chairman Jordan Speaks
		2:30pm	USD	Core PCE Price Index m/m
		4:00pm	USD	Revised UoM Consumer Sentiment

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<https://www.businessinsider.com/gambling-young-men-sports-betting-crypto-meme-stock-market-addiction-2024-4>

Markt generell

The big new way to get rich

Want to make a fortune? Target bored young men who want to make a fortune.



Cheap can get cheaper and expensive can get pricier.

Don't buy something just on the basis of it being cheap or sell it on the basis of it being expensive.

Look into why it is cheap or expensive first.

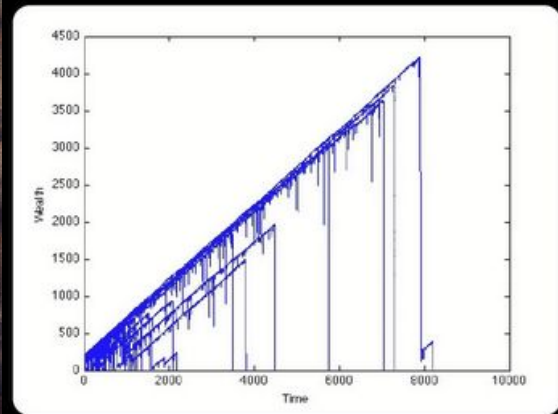


 **ᐃᐱᐱᐁᐁᐁᐁᐁᐁᐁᐁ**
@dannelly_brent

Someone on stack exchange ran a simulation of 100 players starting with \$100 all using a Martingale betting strategy. This is the result.

Cool graph.

math.stackexchange.com/questions/8390...

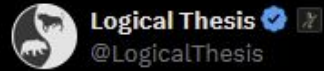


1:12 · 16 Apr 24 · 197K Views

90 Reposts 26 Quotes 843 Likes

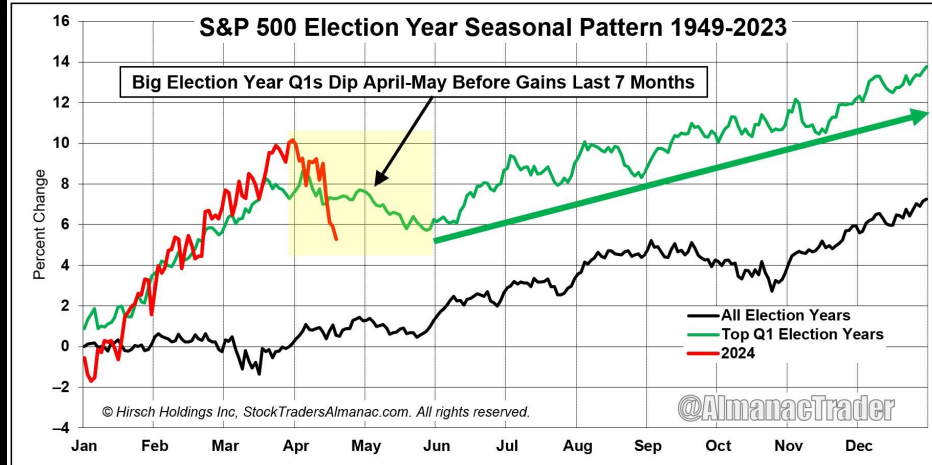


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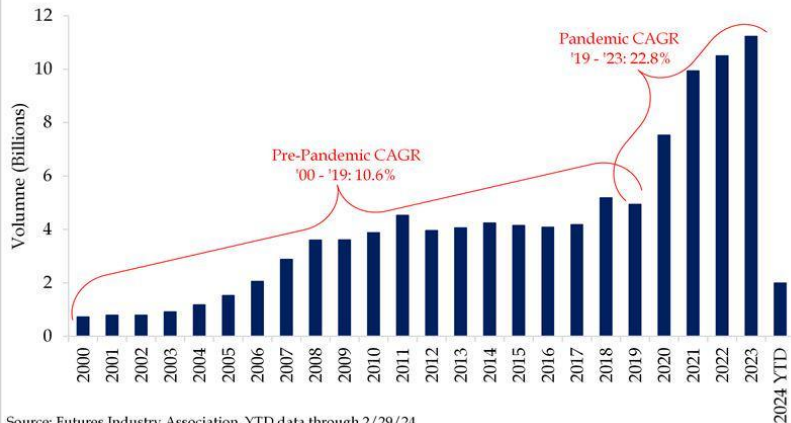


While everyone is waiting for THE low in the indexes to go long, note back in October that individual stocks bottomed before the indexes. We are at those same levels now

SSPY



Equity Options Volumes On U.S. Exchanges

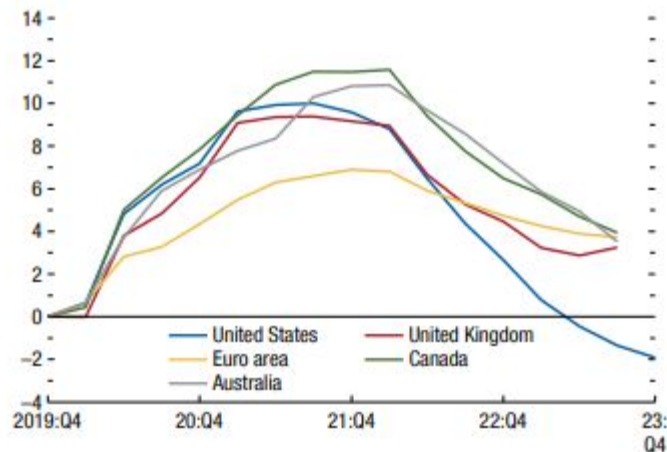


Source: Futures Industry Association, YTD data through 2/29/24

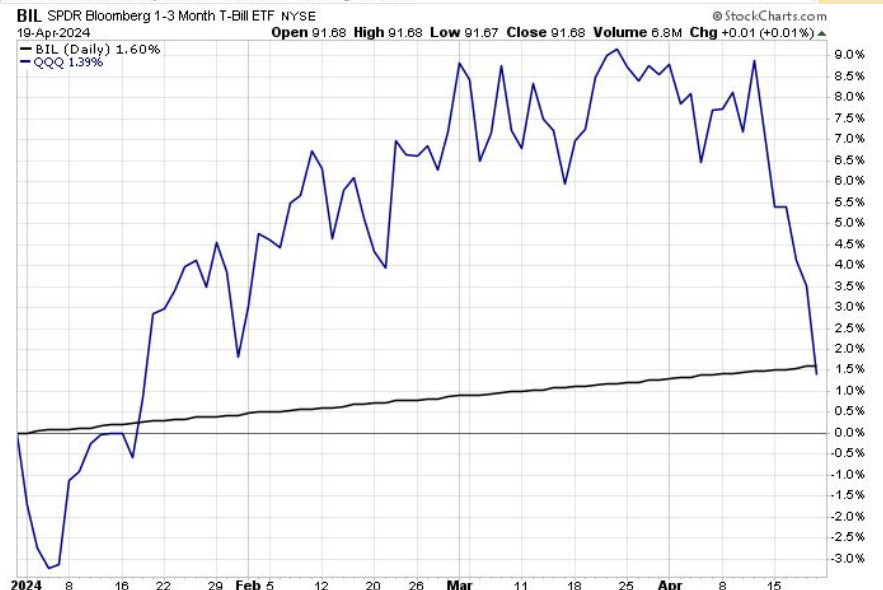
Markt generell



Figure 1.10. Savings from the Pandemic: Declining (Percent of GDP)



Sources: de Soyres, Moore, and Ortiz 2023; and IMF staff calculations.
 Note: Excess savings are calculated as the deviation from the predicted saving rate using a Hamilton trend. Accumulation starts in the first quarter of 2020. Euro area comprises France, Germany, Italy, and Spain.





Robinhood Help

<https://t.co/L1x34q2TpE>

Joined March 2015 • 122.3K Followers

Today

Good morning,

Thank you for contacting Robinhood. We appreciate you bringing this to our attention. The 24-hour market was temporarily unavailable due to a market-wide outage. Trading resumed at 4:00 AM ET. We thank you for your patience while our team resolved this. Let us know if you have any further questions. We are here to help!

7:27 AM

Accept

Block or report

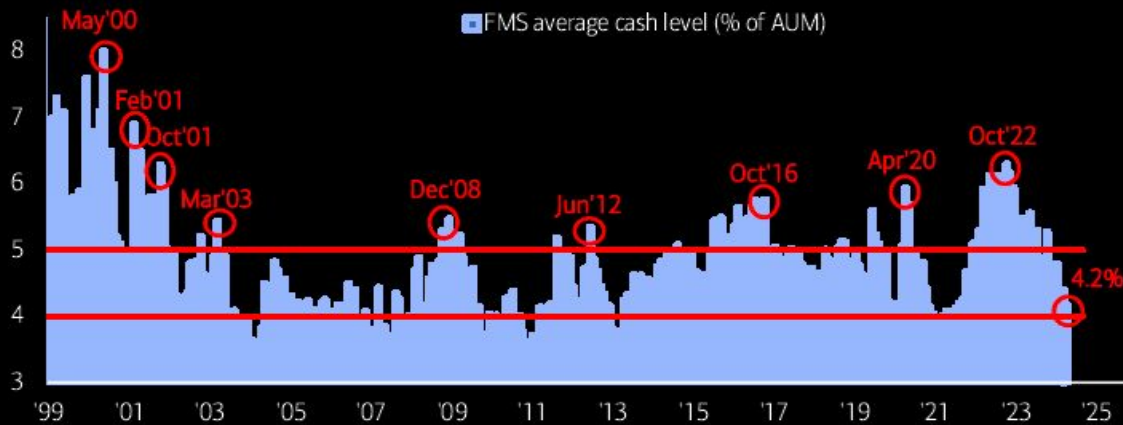
Delete

Markt generell

Percentile rank of FMS growth expectations, cash level, and equity allocation



FMS average cash level (% of AUM)



<https://www.munichre.com/de/insights/cyber/cyber-insurance-risks-and-trends-2024.html#-968996283>

Staatliche Beteiligung am Cyber-Schutz

Cyber-Versicherung hat zweifellos zum Aufbau einer höheren Resilienz beigetragen. Gleichzeitig gibt es Grenzen der Versicherbarkeit. Die Schäden aus katastrophalen systemischen Ereignissen wie einem Cyber-Krieg oder einem Ausfall von kritischer Infrastruktur würden die Kapazität der Branche bei weitem übersteigen. Solche Szenarien bedrohen die makroökonomische Stabilität. Genau aus diesem Grund bedarf es der Mitwirkung von Regierungen bei der Bewältigung dieser potenziell katastrophalen Cyber-Risiken. Munich Re kann und wird die Entwicklung entsprechender Lösungen unterstützen und plädiert klar für die Einführung eines Cyber-Schutzschirmes für die Wirtschaft. Die Gespräche über derartige staatliche Absicherungen, auch als „Government Backstops“ bezeichnet, sind bereits im Gange.

Jürgen Reinhart, Chief Underwriter Cyber: „Die mit der Digitalisierung einhergehenden Risiken stellen eine gesamtgesellschaftliche Herausforderung dar. Die Versicherungswirtschaft trägt ihren Teil zur Bewältigung dieser Risiken bei. Jedoch können die größten systemischen Cyber-Risiken, etwa der Ausfall kritischer Infrastruktur oder Schäden durch einen Cyber-Krieg, nicht durch den privaten Sektor allein getragen werden. Wir stehen bereit, Regierungen beim Management dieser potenziell katastrophalen systemischen Risiken für unsere Gesellschaften zu unterstützen, indem wir gemeinsam nach alternativen Lösungen suchen.“

AI models such as [OpenAI's ChatGPT](#) “are just insatiable in terms of their [thirst](#)” for electricity, Haas said in an interview. “The more information they gather, the smarter they are, but the more information they gather to get smarter, the more power it takes.”

Without greater efficiency, “by the end of the decade, AI data centers could consume as much as 20% to 25% of U.S. power requirements. Today that’s probably 4% or less,” he said. “That’s hardly very sustainable, to be honest with you.”

The power issue has drawn growing attention from technology executives in recent months and helped drive up the stock prices of companies that own and operate electric-power plants.

In a January report, the International Energy Agency said [a request to ChatGPT requires 2.9 watt-hours of electricity on average—equivalent to turning on a 60-watt lightbulb for just under three minutes. That is nearly 10 times as much as the average Google search.](#) The agency said power demand by the AI industry is expected to grow by at least 10 times between 2023 and 2026.

AI/LLM



Indian PM's 25-year roadmap laid out with help from AI

AI is so good at drawing pictures and driving cars, why not let it govern a country?

▲ [Laura Dobberstein](#)

Wed 17 Apr 2024 | 02:02 UTC

India's prime minister, Narendra Modi, used AI to help develop the nation's 25-year development roadmap, according to comments made during a live-streamed interview with news agency ANI on Monday.

The PM [revealed](#) his team gathered the opinions of over 1.5 million people and then refined and classified it using AI.

“I made it subject-wise with the help of AI,” stated Modi, according to a machine translation from Hindi to English.

“This is our blueprint for 25 years, which is my own vision now,” declared the incumbent seeking re-election.

AI Companies Are Running Out of Internet

AI is hungry, and there's not enough data to sate its appetite.

https://www.theregister.com/2024/04/18/darpa_f16_flight/

US Air Force says AI-controlled F-16 fighter jet has been dogfighting with humans

Robo-plane was made to restrain itself so as not to harm pilot or airframe

▲ [Thomas Claburn](#)

Thu 18 Apr 2024 | 23:45 UTC

VIDEO The US Air Force Test Pilot School and the Defense Advanced Research Projects Agency (DARPA) claim to have achieved a breakthrough in machine learning by demonstrating that AI software can fly a modified F-16 fighter jet in a dogfight against human pilots.

The publicly traded stock representing **Donald Trump's "media group"** took another dive after Trump and the founders disclosed their intent to take the money and run.

The company's DJT, -16.88% S-1 filing with the Securities and Exchange Commission includes the potential sale of up to 114,750,000 shares held by former President Donald J. Trump.

That amount includes the 78,750,000 common shares he received after the merger with special-purpose acquisition company (SPAC) Digital World Acquisition closed on March 25. It also includes 36 million in "earnout shares," which may be issued to Trump depending on how the stock performs over the next three years.

Trump stands to make another \$950 million from Trump Media – unless the stock plunges again

Despite Trump Media's recent stock slides, the former president is about to be awarded another 36 million shares.

When the questionably leveraged company that rescued Donald Trump with a last-minute \$175 million court bond insured itself with its own parent company, it raised concerns about how the company was playing with its finances.

But now, as even more details come out about that parent company—particularly that it's based in the Cayman Islands, a notorious tax haven—the concerns are just piling up.

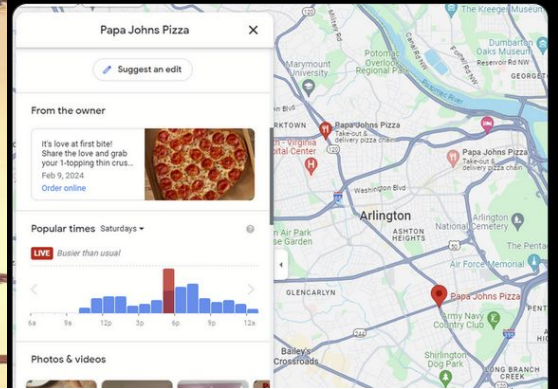
Former industry regulators and investigators told The Daily Beast that Knight Specialty Insurance Company being financially backed by a firm based in the Cayman Islands should raise eyebrows at the New York AG's office—particularly because companies frequently organize in the Cayman Islands not just to avoid taxes, but also to minimize visibility into its business practices, avoid more stringent U.S. regulations, and make liability harder should things go wrong.



Via Fefe

lyndon b johnson famcam workers cooperative @lbjfamcoop

The Papa Johns closest to the Pentagon is far busier than usual



← Pentagon City Metro Station

Populære tidspunkt: lørdager

Nå: Travlere enn vanlig



USA

Americans Have Never Been So Far Behind on Their Credit Card Bills

By: Adam Hardy | Editor: Julia Glum
Published: Apr 15, 2024 | 5 min read



SUMMARY OF FED CHAIR POWELL'S COMMENTS (4/16/24):

1. Recent data "shows lack of further progress on inflation"
2. Inflation has "introduced new uncertainty" on whether the Fed can cut rates later this year
3. Fed can maintain higher rates for "as long as needed"
4. Recent data has not given greater confidence on inflation
5. Restrictive Fed policy needs more time to work
6. It will likely take longer to "regain confidence" on inflation

What happened to the "Fed pivot?"



A new report from the Federal Reserve Bank of Philadelphia provides a glimpse into how Americans are dealing with **credit card debt** — and the picture is pretty bleak.

The phrase "series high" appears again and again throughout the **short analysis**, underscoring the fact that credit card balances, delinquencies and utilization rates have reached the highest levels since the Philadelphia Fed began tracking this data in 2012.

"Credit card performance worsened to historical levels," the report states, noting that the share of folks who fell behind at least 30 days on their credit card payments reached an all-time high between October and December 2023.

Overall, about 3.5% of card balances were past due 30 days or more. The share of people who were further behind on their credit card bills also climbed by the end of the year. Meanwhile, nearly 11% of cardholders were making only the minimum payment possible: another record high.

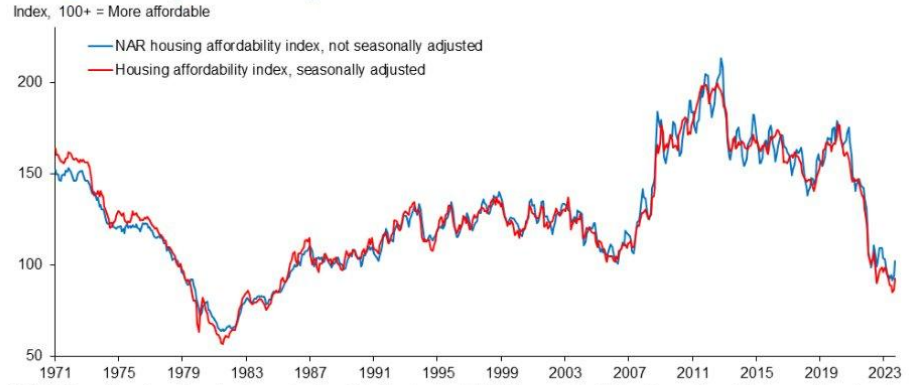
USA

US Senate to Vote on a Wiretap Bill That Critics Call 'Stasi-Like'

A controversial bill reauthorizing the Section 702 spy program may force whole new categories of businesses to eavesdrop on the US government's behalf, including on fellow Americans.



Chart 1
Housing affordability fell dramatically since 2022



NOTES: The red line shows the authors' reconstruction of the Housing Affordability Index using the National Association of Realtors median sales price (with the Census Bureau's X-12-ARIMA seasonal adjustment), Freddie Mac 30-year fixed-rate mortgage and Census Bureau median household income.
SOURCES: National Association of Realtors; authors' calculations.

Federal Reserve Bank of Dallas

Charles Gasparino @CGasparino

Breaking: Wall Street execs following @WhiteHouse economic policy say @JoeBiden Administration plans to ramp up spending even more as @federalreserve postpones rate cuts; @SecYellen likely to continue to roll over short term debt to prevent a spike in 10-year yields that caused stock to tank last year more now @FoxBusiness

5:49 PM · Apr 18, 2024 · 245.1K Views

59 162 365 88

Post your reply Reply

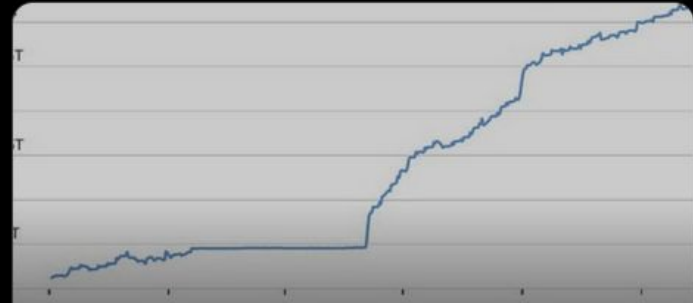
Global Markets Investor @GlobalMktObserv · Apr 18

Meanwhile, US debt has been rising by \$1 trillion every 100 days

The US debt-to-GDP ratio is at 124%, near the record of 126% in 2020

The CBO estimates it will reach 131% in 2034

Since 1800, 51 out of 52 countries with a ratio above 130% have defaulted



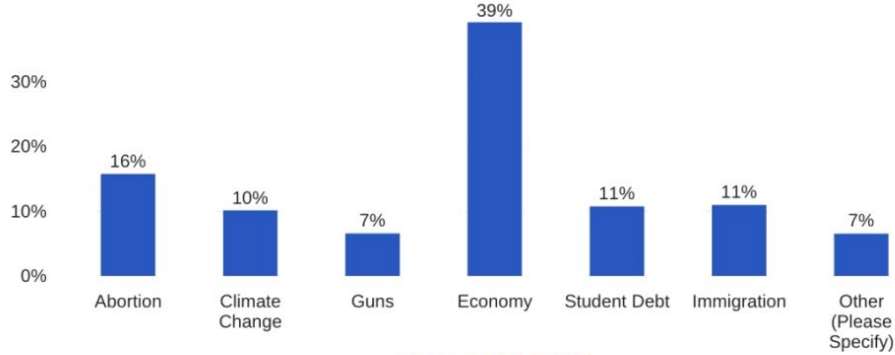
The US national debt reached \$34.5 trillion, an all-time record, but does it actu...

From open.techwriters.info

Axios Poll 18 to 34-year-olds nationwide

Q: "Which of the following issues matters to you MOST?"

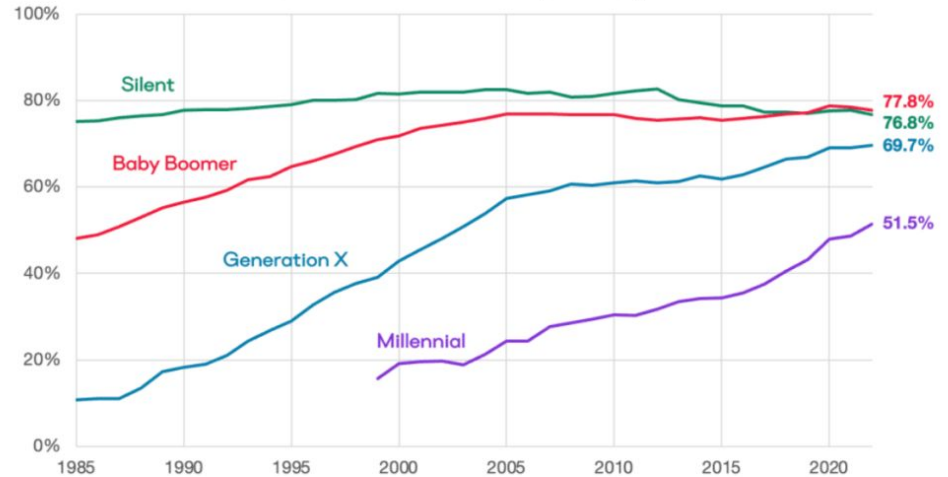
Overall



February 3-14, 2024



Generational Homeownership Rates, 1985-2022



Source: Current Population Survey, Annual Social and Economic Supplement, 1985 - 2022

<https://pluralistic.net/2024/04/10/an-injury-to-one/>

Europa/DE

But the UAW has also filed a complaint with BAFA, the German regulator in charge of the Supply Chain Act, seeking penalties against Mercedes-Benz Group AG:

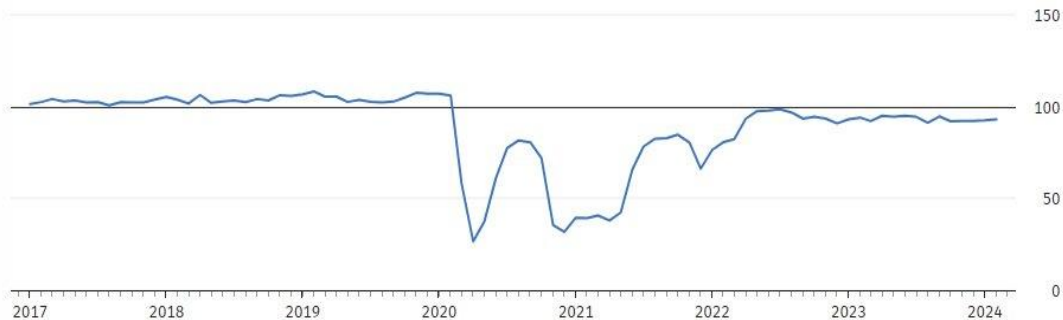
<https://uaw.org/uaw-files-charges-in-germany-against-mercedes-benz-companys-anti-union-campaign-against-u-s-autoworkers-violates-new-german-law-on-global-supply-chain-practices/>

That's a huge deal, because the German Supply Chain Act *goes hard*. If Mercedes is convicted of union-busting in Alabama, its German parent-company faces a fine of 2% of its global total revenue, and will no longer be eligible to sell products to the German government. *Chomp*.

Now, the German Supply Chain Act is new, and this is the first petition filed by a non-German union with BAFA, so it's not a slam dunk. But supermajorities of Mercedes workers at the Alabama factory have signed UAW cards, and the election is going to happen in May or June. And the UAW - under new leadership, thanks to a revolution that overthrew the corrupt old guard - has its sights set on all the auto-makers in the American south.

Umsatz des Gastgewerbes

2015 = 100



— reale Originalwerte — real Kalender- und saisonbereinigt (X13 JDemetra+) — nominale Originalwerte
— nominal Kalender- und saisonbereinigt

© Statistisches Bundesamt (Destatis), 2024



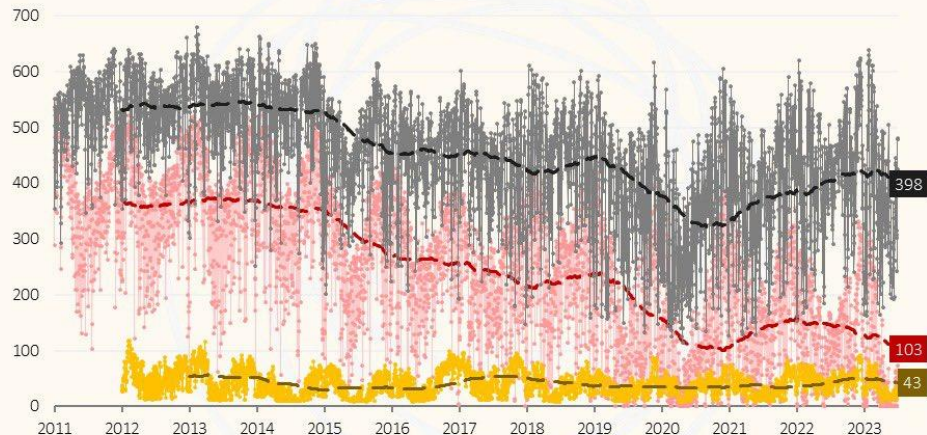
How clean would German electricity be without its nuclear phaseout?



Specific carbon intensity of electricity in grams of CO₂ emitted per kWh generated

Daily emissions: ● France, ● Germany, ● Germany without nuclear phaseout

Trailing L12M average emissions rate: — France, — Germany, — Germany without nuclear phaseout

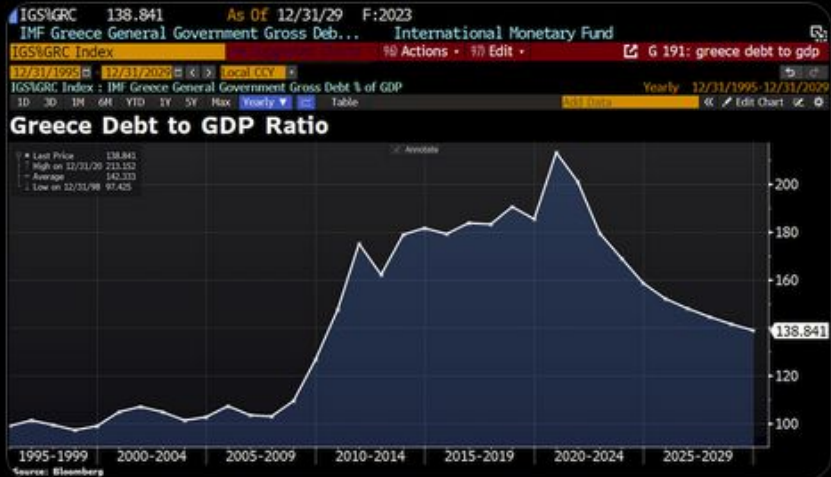


Notes: Specific carbon intensity of electricity in gCO₂/kWh values of 1150g, 900g, 700g, 400g, 250g and 0g are used for lignite coal, hard coal, oil, natural gas, waste, and biomass respectively, with 0g used for nuclear, hydro, wind, and solar sources. Germany without nuclear phaseout scenario assumes the 170TWh/yr of nuclear generation in 2001 was maintained and displaces the highest emitting fuels. Sources: Fraunhofer ISE and RTE-France for data pre-2015. ENTSO-E for data post-2014. Data from 1st Jan 2011 to 30 Jun 2023. For more information, please email: info@radiantenergygroup.com



Holger Zschaepitz @Schuldensuehner · Apr 19

S&P raised #Greece's credit outlook to positive from stable, just mths after rating agency upped country to investment grade, a status lost in 2010. Greece's rating was affirmed at BBB-. Debt ratio is seen declining to 152.3% of GDP in 2024 from a high of 206% in 2020. (via BBG)



"EVEN YOUNG GUYS CAN'T STAND TWO YEARS IN THE TRENCHES"

What is the current situation with ammunition in your area? Is there enough?

There is a shortage of ammunition, but not so critical, **what is needed now are people**. And the point is not, as many people like to say, that we have a lot of dead. Yes, of course, this is a war, we have losses. But people drop out because they are injured or simply for health reasons. Because even young guys can't stand to spend two years in the trenches, their health is not good enough. And in our army, the average age is probably 40-42. Because we don't have young people going to war, we have men who are over 40. A lot of them leave for health reasons... And fewer come back for various reasons. And this is the main reason why there are not enough people.

If there were more people, it would be much easier for those guys in the trenches, because they would know that they have been in the trenches for two days and then gone on a break for two days. But now he has to sit more. And because of this, morale is already declining, it's harder.

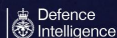
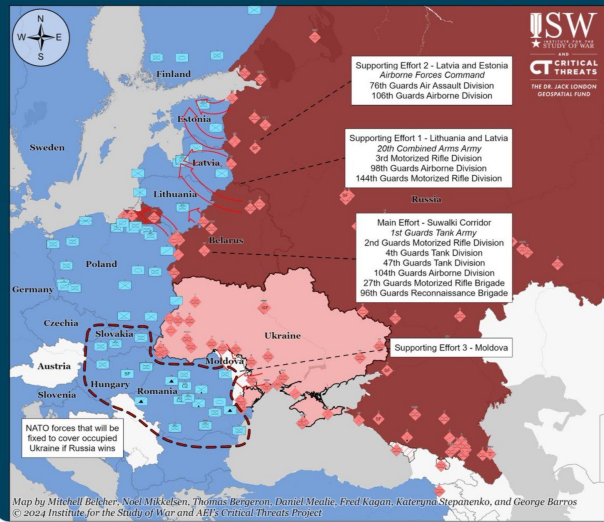


OSINTdefender @sentdefender · 40m

The U.S. House of Representatives has Passed all 3 of the Military Aid Bills to Ukraine, Israel, and Taiwan today by a Vote of 316-94, with the Bills in Total being Worth roughly \$95 Billion.



Russia Victory: Baltic Invasion Scenario Analytical Assessment April 15, 2024



UPDATE ON UKRAINE
20 April 2024

INTELLIGENCE UPDATE

- On 19 April 2024, Russia carried out airstrikes using Tu-22M3 BACKFIRE C strategic bombers likely against targets in southern Ukraine. Defence Intelligence of Ukraine announced that they had shot down one of the bombers, with reports circulating online that appeared to show a single BACKFIRE losing control in the air, and subsequently crashing into a field.
- The Russian Ministry of Defence confirmed that a BACKFIRE had crashed and that a Search and Rescue Mission was ongoing but did not admit to the shoot-down. However, it is almost certain that reports of a S-200 missile [SA-5] being used are accurate and that this was another successful Ukrainian action against the Russian Air Force. This system is likely the same system used to shoot down a Russian A-50 MAINSTAY on 23 February 2024.
- This is the first instance of a strategic bomber being shot down by Ukrainian Air Defence systems. It is highly likely that Russia has now sustained at least 100 fixed-wing combat aircraft losses to date.

BREAKING:

Russian forces withdrawing from Nagorno-Karabakh after having been told the get out by Azerbaijan

Soon to be seen repeated in Ukraine, Belarus, Georgia and Moldova



0:14

\$10 Million In Gold Disguised As Machine Parts Seized From Cargo Plane

Yes, gold smuggling is wrong, but you do kind of have to respect the innovation.

By Collin Woodard Published April 9, 2024 | Comments (46)



Photo: Hong Kong Customs and Excise Department

Customs officials in [Hong Kong](#) seized 146 kilograms of gold late last month, worth an estimated \$10 million. They discovered the gold on a [cargo plane](#) scheduled to leave for Japan, and officials now say the value of the seizure makes it the biggest gold smuggling case in Hong Kong's history. What makes this case especially interesting, though, is that [Business Insider reports](#) the gold was disguised as machine parts.



Rebecca Choong Wilkins 钟碧琪 @RChoongWilkins · Apr 19

German Visit. Xi and his deputies pushed back on criticism of China's surging clean-technology exports and unfair treatment of foreign firms by the German chancellor. Scholz made the comments on a visit to the Asian nation with a business delegation. 4/10

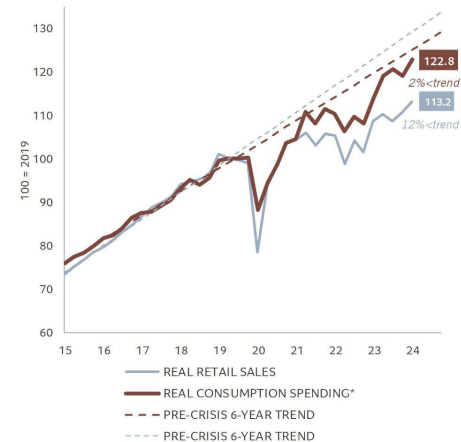


Scholz Says He Will Raise Trade Rules, Ukraine in Talks With Xi

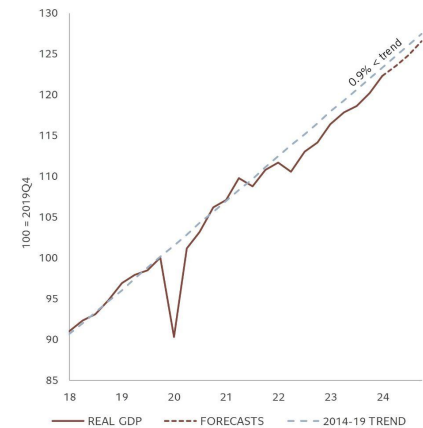
From bloomberg.com

China

China consumption spending and retail sales (real, 100 = 2019)

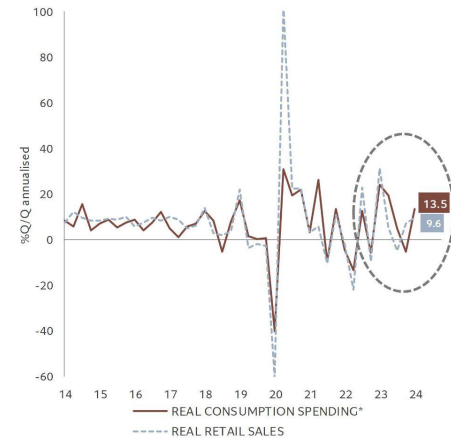


*Nominal consumption spending per capita rescaled by population and adjusted for inflation
China real GDP growth (%Q/Q ann. & %Y/Y)



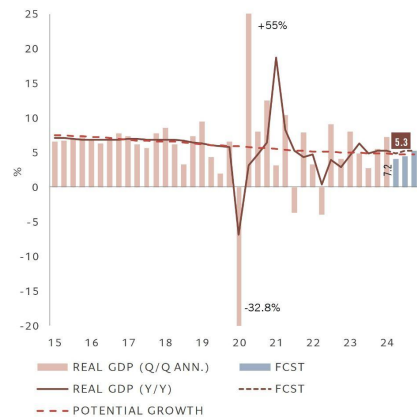
Source: Pictet Asset Management, CEIC, Refinitiv

China consumer spending and retail sales (real, %Q/Q ann.)



*Nominal consumption spending per capita rescaled by population and adjusted for inflation

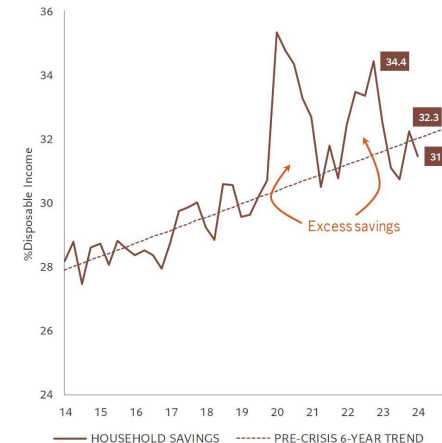
China real GDP growth projections (%Q/Q ann. & %Y/Y)



*Mixed forecasting: non-accelerating inflation growth of output, HP filtering, working-age population

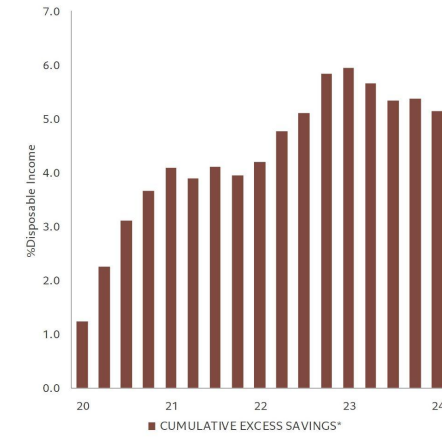
Source: Pictet Asset Management, CEIC, Refinitiv

China household savings (% disposable income)



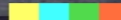
Source: Pictet Asset Management, CEIC, Refinitiv

China excess savings (%disposable income)



*Cumulative savings deviating from the pre-pandemic trend in the savings to disposable income ratio

Source: Pictet Asset Management, CEIC, Refinitiv



Samir @obretix · 3h

damaged/destroyed radar of the S-300 air defense battery near Isfahan today [google.com/maps?ll=32.781...](https://www.google.com/maps?ll=32.781...)



HALVING COUNTDOWN

BLOCKS REMAINING



UNTIL 849,800

ESTIMATED TIME TO HALVING

00 : 00 : 00 : 00

DAYS HRS MIN SEC

BTC / USD

\$63,491.04

BTC/USD

powered by 

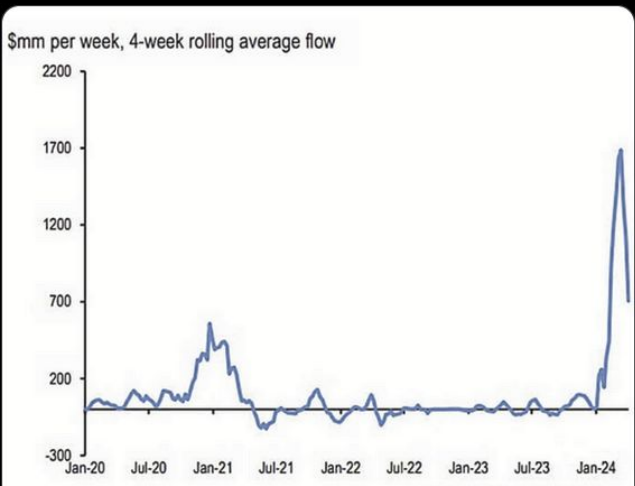
Crypto



Michael Saylor ⚡ 
@saylor

Chaos is good for **#Bitcoin** .

Is **#Bitcoin** no longer a hedge against instability?



Bearish Bets

The total short interest in 15 crypto-mining stocks is nearly \$2 billion

Short Interest

Marathon Digital	\$867.4million
CleanSpark	380.3
Riot Platforms	355.7
Terawulf	87.9
Hut 8	79.9
Cipher	73.3
Bitfarms	52.1
Bit Digital	39.4
Hive	19.5
Bitdeer	13.0
Core Scientific	12.5
Iris Energy	7.0
Stronghold	0.8
Argo Blockchain	0.5
Digihost	0.1

Alleged cryptojacking scheme consumed \$3.5M of stolen computing to make just \$1M

Indictment says man tricked cloud providers into giving him services he never paid for.

DAN GOODIN - 4/15/2024, 9:46 PM

Sonstiges

