

Global Reset Highlights

Covid; Supply chains coming home; Russian -Ukraine war all leads to 'De-Globalization.'

Decades of falling interest rates have come to an end and we have sticking inflation.

We are going from financial engineering strategies to improved productivity to help companies stock price. De-Financialization is upon us.

The World is in a big transition (Covid, fiscal and monetary response, inflation, rising interest rates, work from home)

China's one party, state planned system work well in the early to mid-stages of modernization but not anymore.

China's aging population and turning old before it gets rich is an issue. Rules a plenty, but no 'Rule of Law'

Zero COVID policy led to protests and more government monitoring and there will be more exodus of expats and some citizens.

Sectors to benefit: manufacturing, healthcare, defense, infrastructure, technology and semiconductors.