

科學世界的奇妙旅程

05/01 20:00

on Zoom 正式
上線



思索過去 想像未來





關於未來**30**年大家的命運,

T-20170303

馬雲在河南鄭州舉行的2017中國綠公司年會到底預言了什麼?

What has **Jack Ma** foreseen in his unusually **grim** warning about

how the **Internet** will disrupt the **world**

J-20170120

as **Alibaba** takes it cue from **Amazon**?

T-20170407

人工智慧工業革命與數位資本主義滾動之時代巨輪的輾壓下，
人類學習的方式與生存的技能必須脫胎換骨 ...

T-20170407



www.wgp-global.org

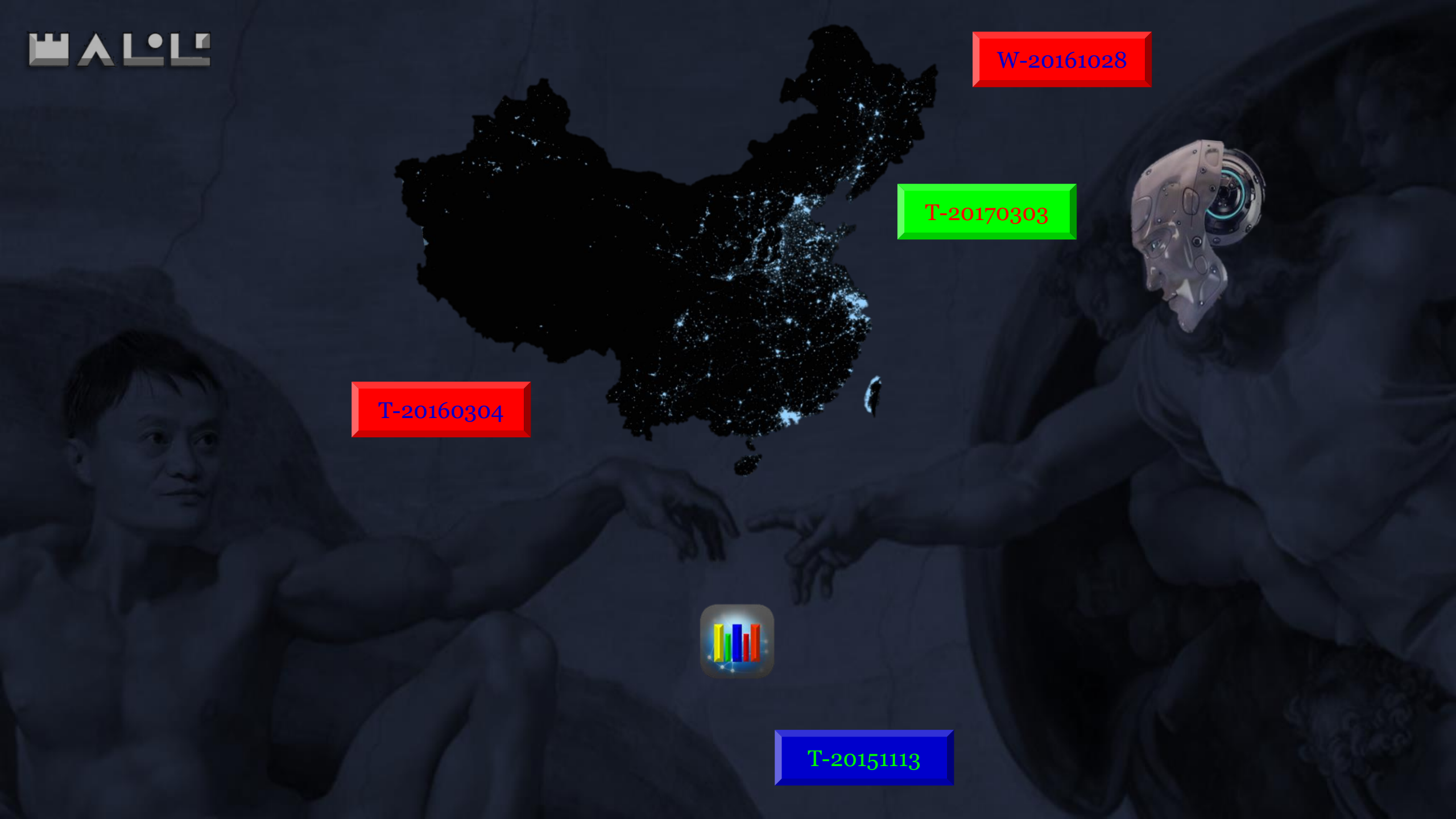
W-20161028

T-20170303

T-20160304



T-20151113



K-20160617

Q-20170217

川普政策搖擺，高盛陰溝裡翻船？！



K-20161111

A-20170106

What has gone wrong for **Goldman's** debt-trading strategy in the **Trump** trade while **China** is determined to crack down **shadow-banking** risks?



A-20170407

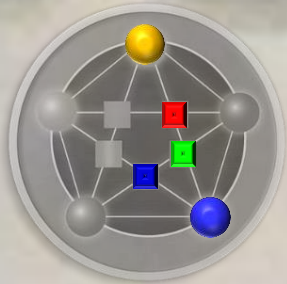
Q-20170414

Q-20170120

A-20170217

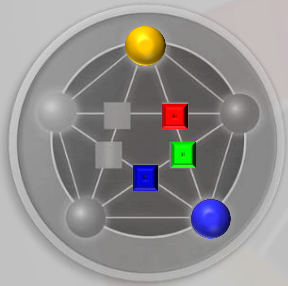


Q-20161216



WAVEX

DIAGRAM



1B1R

Export

Tariff

TRUMPNOMICS

GHY

CN

US

Stimulus Tax-Cut

TRUMPNOMICS



WALL

A-20170106



20170421
WALL

A-20170310

美國優先 全球變天

Is China's **economy** **simmering** in the back of
the fading **hype** of **Trumponomics**
to lead the global growth while the **IMF** warns of **credit risks**?

K-20170331

鴨子划水一帶一路





T-20160624



K-20170120



J-20170414

Is the UK May's call for a **snap general election** a **clever tactic but not smart strategic** decision for the long run

right before the **France election?**



W-20160603



Where are the male politicians in Europe? ... Uhh, Putin!



政策的格局決定長期的投資

Has the stock market's **Trump rally** been fundamentally justified
by **earnings growth** prospects - or just pushed
by the **tax-cut windfall euphoria**?

企業現金流

: 公司獲利 / 債務利息支付 / 企業稅

A-20170210



20170428

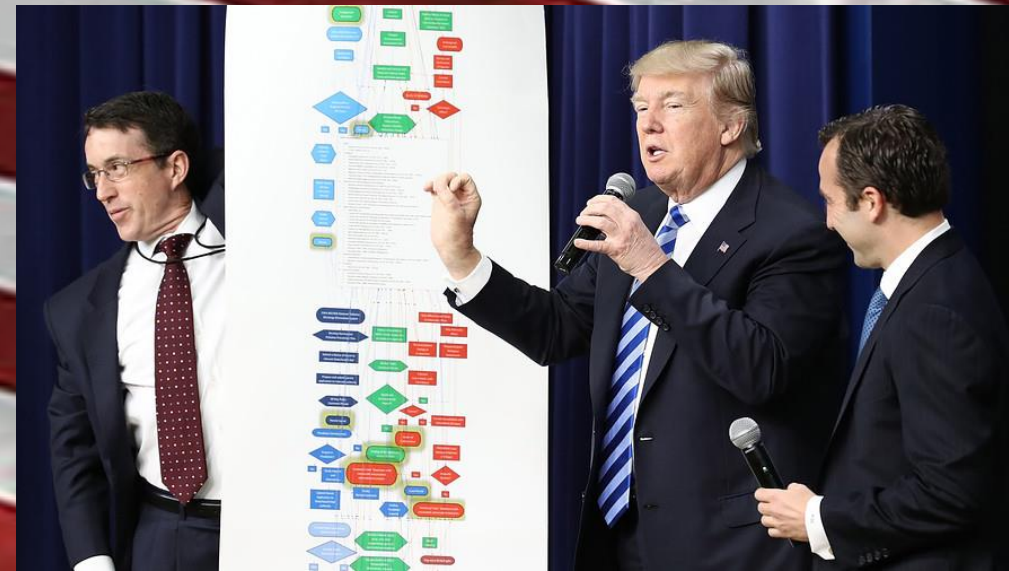
HAILE



系統性風險之未雨綢繆

Q-20170224

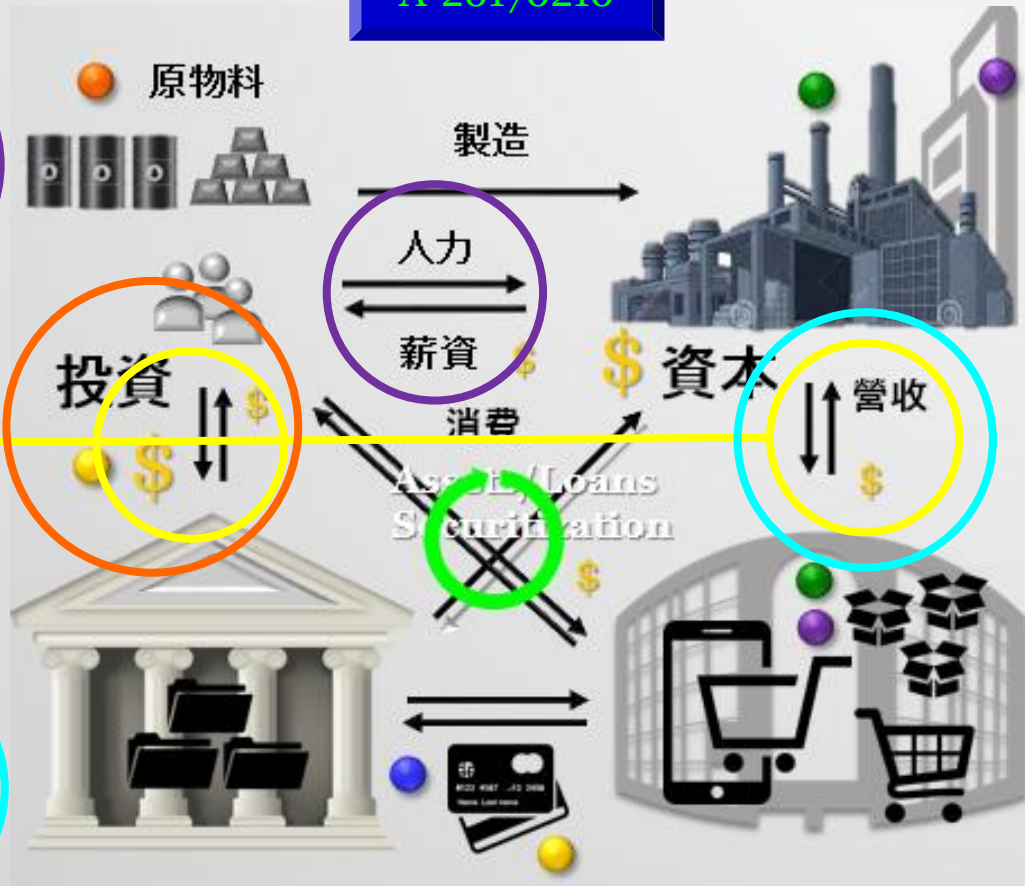
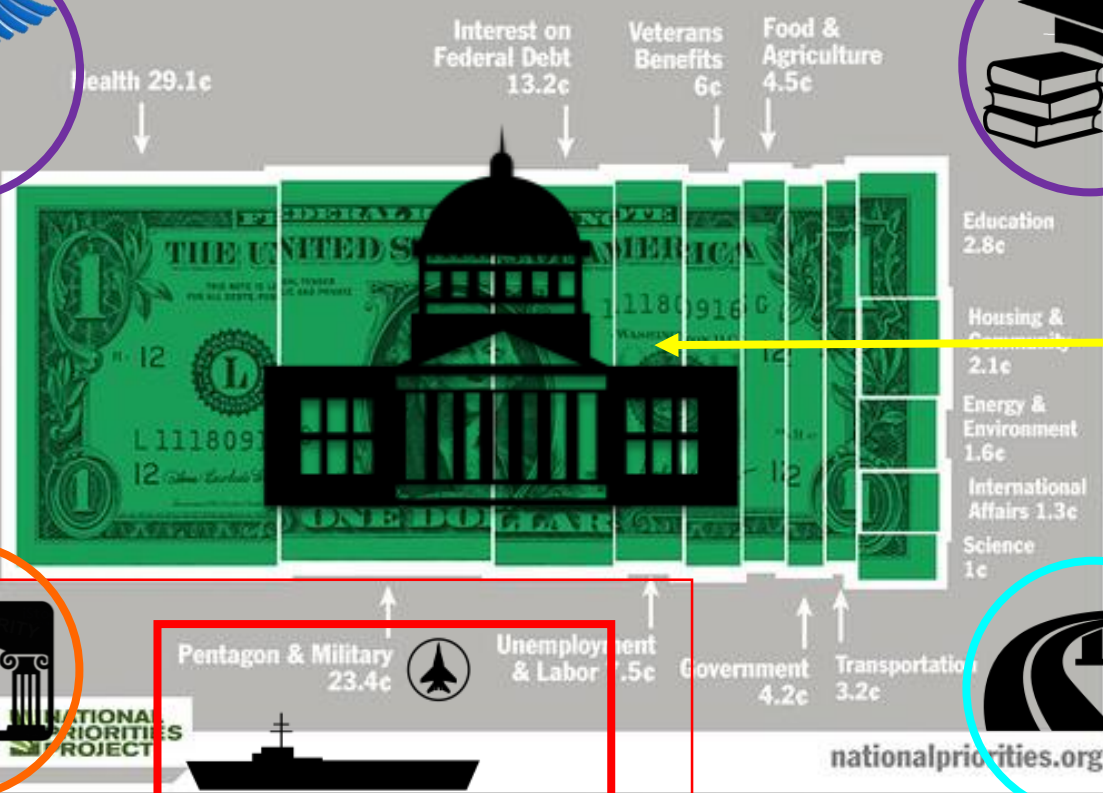
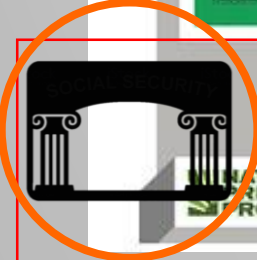
Q-20170407



社會主義/資本主義的權衡法則

基礎建設/教育/醫療/社會福利

A-20170210



A-20170217

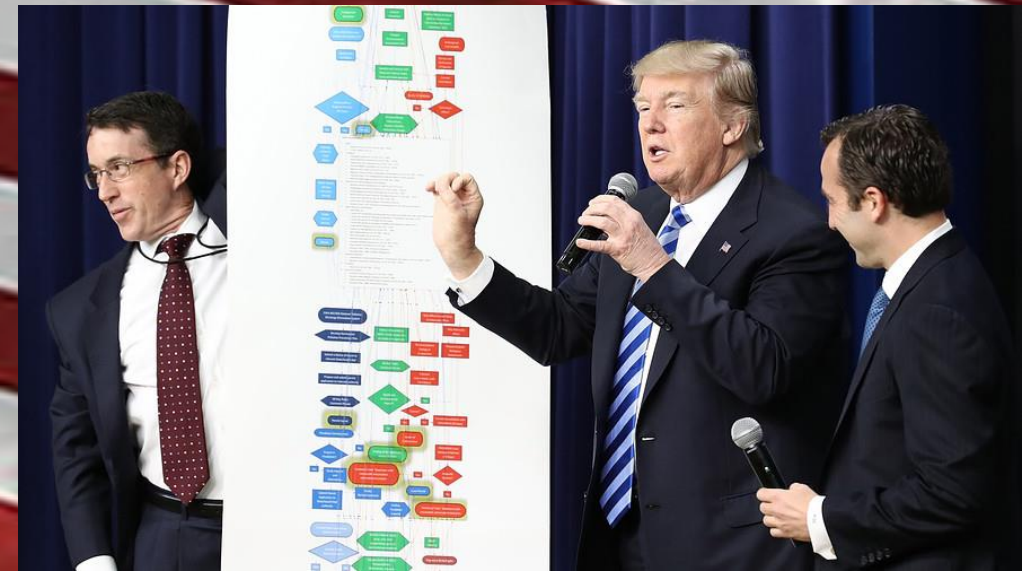


Can you help Trump create a **full-on** Trumponomic blueprint of **fiscal-stimulus/tax-reform** by **earnings** clues amid the IMF's **credit-cycle** warning?

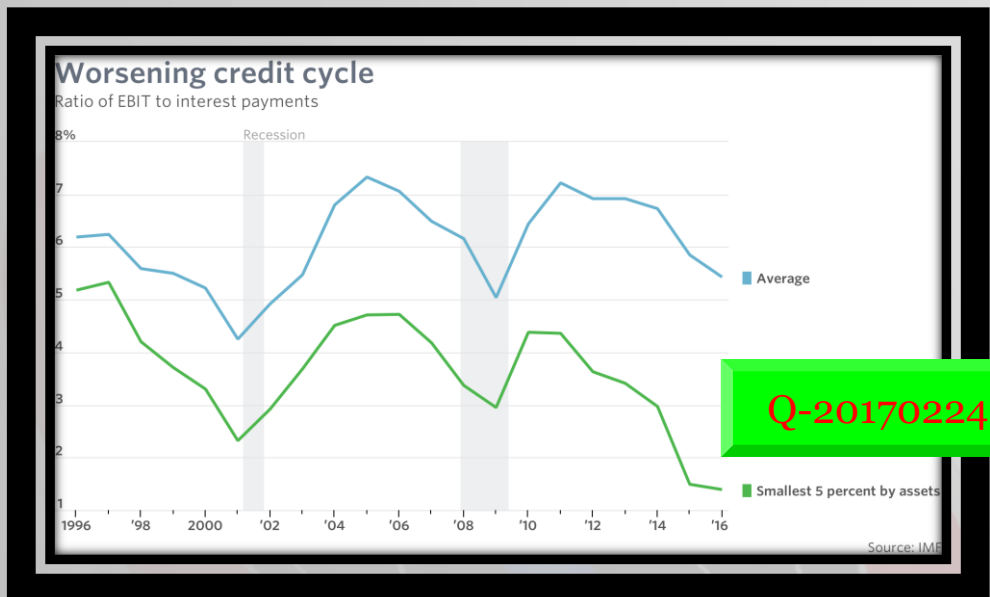
企業現金流：公司獲利/債務利息支付



系統性風險之未雨綢繆



資本市場的遊戲道理與法則



K-20170421	K-20161111	A-20170421
A-20170317	A-20170210	Q-20170224
Q-20170407	T-20170127	J-20170120

Buoy Matrix => Connex of Buoy Paths

keyword

A	K	Q	J	T	20170421	W
A	K	Q	J	T	20170414	W
A	K	Q	J	T	20170407	W
A	K	Q	J	T	20170331	W
A	K	Q	J	T	20170324	W
A	K	Q	J	T	20170317	W
A	K	Q	J	T	20170310	W
A	K	Q	J	T	20170303	W
A	K	Q	J	T	20170224	W

Clear Path

keyword

Buoy: K-20170421

IMF warns of dangers of enacting fiscal stimulus as credit cycle worsens

keyword

Buoy: K-20170421

IMF warns of dangers of enacting fiscal stimulus as credit cycle worsens

Trump-Formula for Corp. Cashflows
 IMF Post-QE Credit-Cycle Warning

Can you help Trump create a full-on Trumponomic blueprint of fiscal-stimulus/tax-reform by earnings clues amid the IMF's credit-cycle

Trump-Formula for Corp. Cashflows
 IMF Post-QE Credit-Cycle Warning

2017-04-21

27 Results 1.2

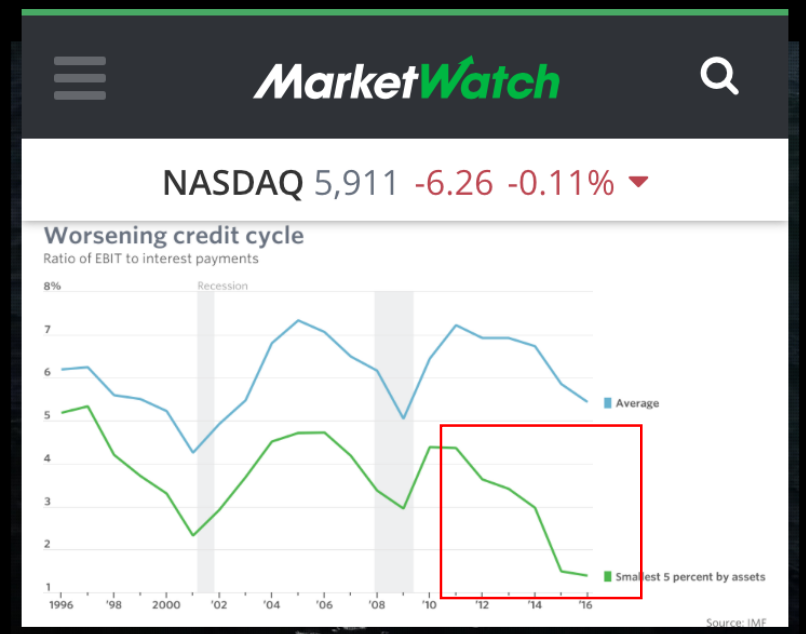
2017-04-19

27 Results 1.2

2017-04-19

Done

IMF warns of dangers of enacting fiscal stimulus as credit cycle worsens



Will a retail corporate-credit rout occur soon to become the Achilles' heel of Trumponomics amid the SEC's worry of messy Non-GAAP earnings?

2017-04-19

Done

IMF warns of dangers of enacting fiscal stimulus as credit cycle worsens

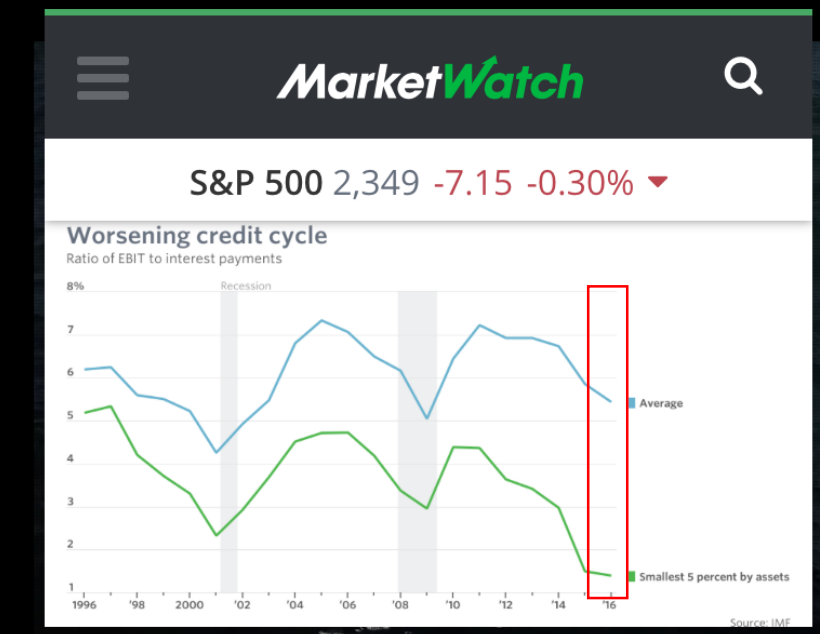


What should Trump's tax-cut plans do to push business investment for better jobs and wage growth rather than benefiting the wealthy class?

2017-04-19

Done

IMF warns of dangers of enacting fiscal stimulus as credit cycle worsens



Is the Fed's "gradual" rate-hike approach too dovish to contain the asset bubble fostered by QE cash-piles as Trump plays the great cheerleader?

2017-04-19

Done

Same News: 33136

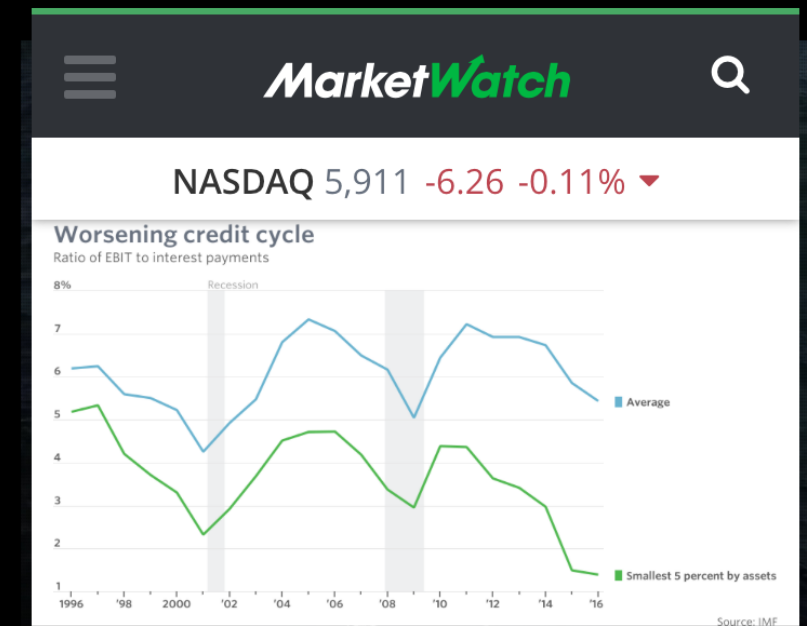
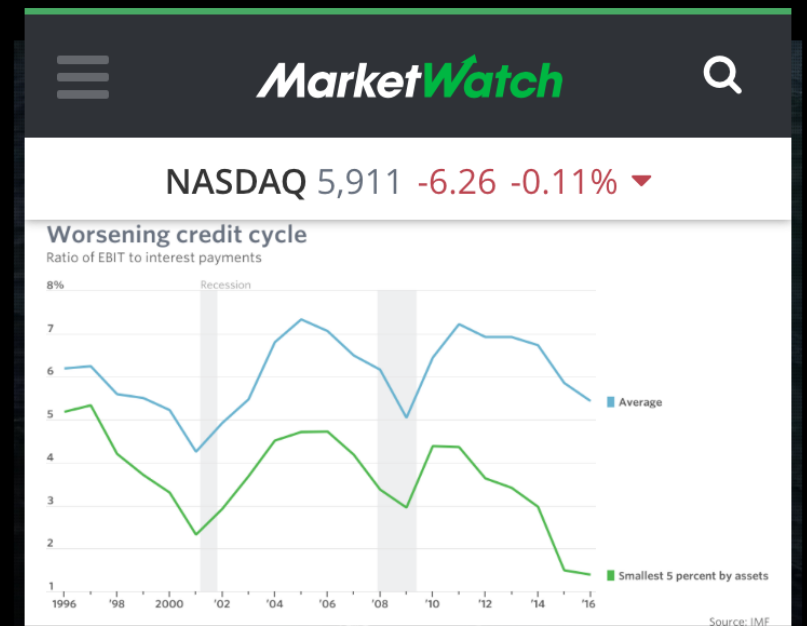
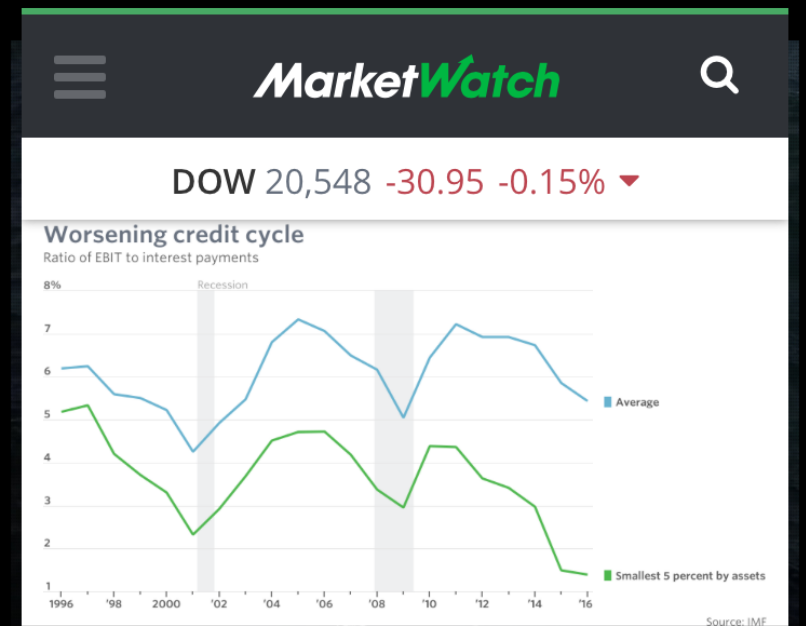
IMF warns of dangers of enacting fiscal stimulus as credit cycle worsens

Same News: 33136

IMF warns of dangers of enacting fiscal stimulus as credit cycle worsens

Same News: 33136

IMF warns of dangers of enacting fiscal stimulus as credit cycle worsens



Will Trump embrace a new global imbalance with a tight rate-cycle and excess currency volatility via policies of fiscal stimulus and trade war?

Can you help Trump create a full-on Trumponomic blueprint of fiscal-stimulus/tax-reform by earnings clues amid the IMF's credit-cycle

Is China's economy simmering in the back of the fading hype of Trumponomics to lead the global growth while the IMF warns of credit risks?

聯準會
主席柏南奇

貨幣供給泡沫

購併熱潮

IMF 倡議全球
經濟刺激政策
退場策略一致

IMF

美國

日本

巴西

全球投資與貿易失衡

英國

G20 圓桌會議

印度

歐盟

TREASURY
美國公債

中國

俄羅斯

G5 Macro G5 Capital Management Ltd.

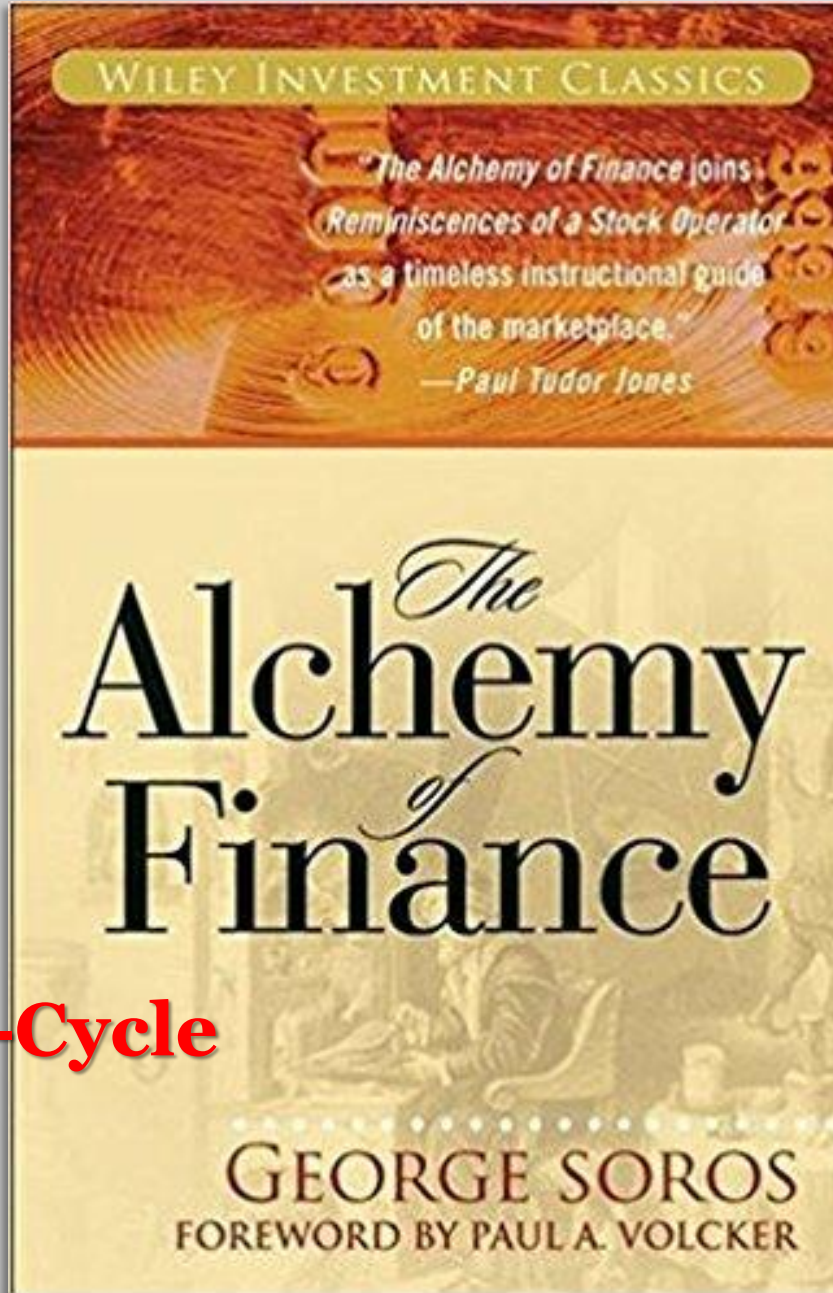
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Q-20161125

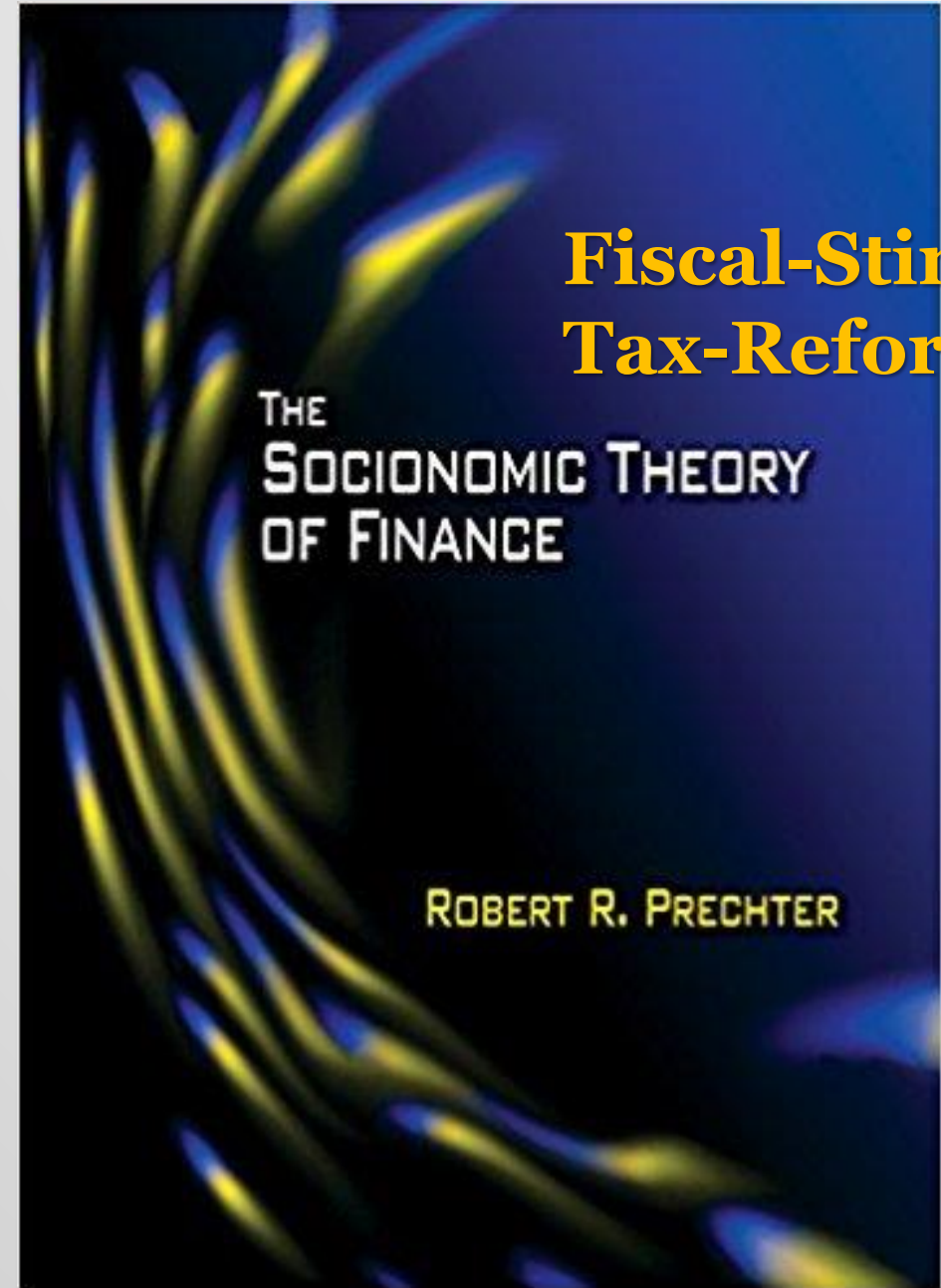
IHRT

K-20161111

2009.09.25



Credit-Cycle



**Fiscal-Stimulus
Tax-Reform**



20170428
WALL
A

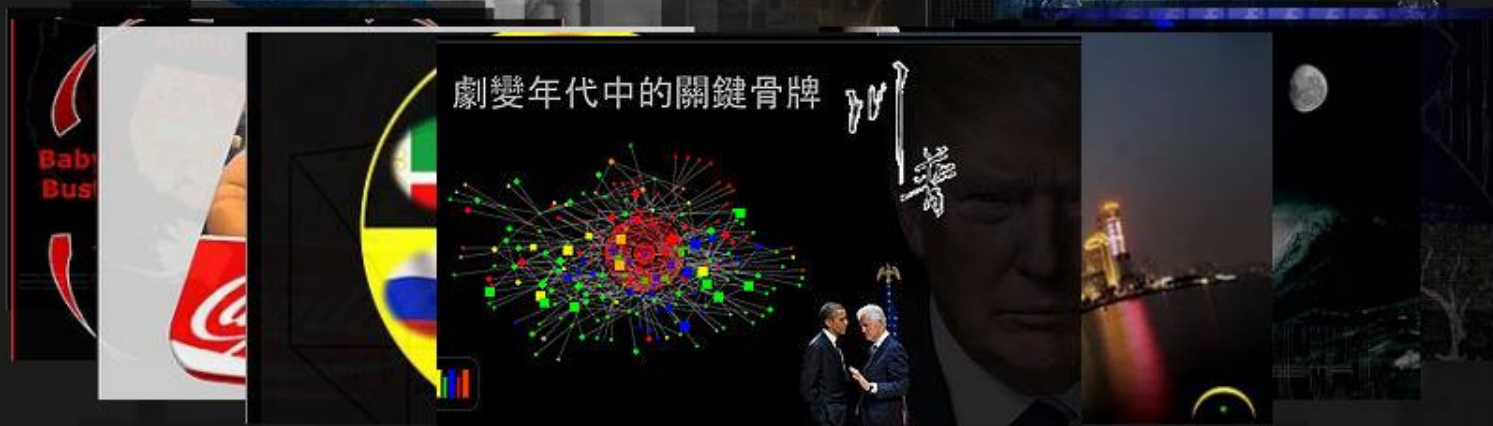
Global

CURRENCY

2017/04/28 (FRI)

全球資本市場是否太樂觀 ? !





learning Macro-Portfolio DIY for the Big Game - GDAA 2020

To put your portfolio-puzzle together, try to connect macro-dots of risk-dominoes in the quizzes with keywords

Time		Macro-Quiz ----- "The wise man doesn't give the right answers, he poses the right questions." - Claude Lévi-Strauss		
20170428	A	Is the market too optimistic over Macron's chance of winning the France election while brushing off tension from the Trump/Kim chicken game?	P	X
20170428	K	Has the stock market's Trump rally been fundamentally justified by earnings growth prospects - or just pushed by the tax-cut windfall euphoria?	S	S
20170428	Q	What has gone wrong for Goldman's debt-trading strategy in the Trump trade while China is determined to crack down shadow-banking risks?	S	B
20170428	J	Why does Trump pick Canada as his first trade-war target by shunning China/Mexico as Ross lays out a plan to toughen up U.S. trade policies?	G	X
20170428	T	What has Jack Ma foreseen in his unusually grim warning about how the Internet will disrupt the world as Alibaba takes it cue from Amazon?	S	S
20170428	W	Shouldn't Uber be worried about Didi's global ambition rather than being obsessed with flying cars to compete with Alphabet's moonshot feat?	P	S

