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## **Better-Management Newsletter 9 August 2015**

**Deflationary coming? / Or hyper-inflation? / Oil prices continue to plunge / Neutrino breakthrough**

### **Deflationary coming?**

Bill Gross believes deflation is now problematic for USA as well as the rest of the world, despite the US Fed seemingly setting its sights of a rise in interest rates in September...

<http://www.telegraph.co.uk/finance/economics/11791449/bond-king-bill-gross-world-lurching-deflation.html>

David Stockman believes the situation is far worse and we face an Epochal fall...He has a sensible view on China that matches my own.

<http://www.zerohedge.com/news/2015-08-07/tops-david-stockman-warns-epochal-deflation>

We are all reliant on China and China may be shutting up shop. Generally, oil demand is now down, which – as with all commodities being down – is a worry...

<http://www.zerohedge.com/news/2015-08-08/stephen-schork-commodity-crash-canary-coal-mine-global-economy>

### **Or hyper-inflation?**

Of course, Venezuela has hit the jackpot with hyper-inflation setting in and the nation's food industry being nationalised...

[http://www.naturalnews.com/050695\\_Venezuelan\\_farmers\\_socialist\\_government\\_food\\_supply.html#](http://www.naturalnews.com/050695_Venezuelan_farmers_socialist_government_food_supply.html#)

### **Oil prices continue to plunge**

Oil prices continued to plunge with rig counts down everywhere...

<http://peakoilbarrel.com/international-rig-count-not-improving/>

This makes current supply excesses very fragile and a price rebound could destroy the global economy...of course, if the US shale producers fall over during autumn, the repudiation of debt could tip over the global derivative markets as well...

<http://oilprice.com/Energy/Oil-Prices/Global-Oil-Supply-More-Fragile-Than-You-Think.html>

Harry Dent is even more bearish...and lots of folks listen to him...

[http://seekingalpha.com/article/3414986-oil-prices-about-to-strike-a-death-blow-to-this-american-industry?source=email\\_macro\\_view\\_eco\\_5\\_31&ifp=0](http://seekingalpha.com/article/3414986-oil-prices-about-to-strike-a-death-blow-to-this-american-industry?source=email_macro_view_eco_5_31&ifp=0)

China's exports are a problem for their economy that won't be solved anytime soon...

<http://www.bloomberg.com/news/articles/2015-08-08/china-s-exports-drop-as-external-demand-fails-to-offer-relief>

and on the back of that...

<http://peakoil.com/publicpolicy/the-devastation-in-global-commodity-currencies-is-far-from-over>

For the USA too, this will be a crisis that no-one saw coming...

[http://seekingalpha.com/article/3413626-heres-the-next-crisis-nobody-saw-coming?source=email\\_macro\\_view\\_eco\\_8\\_34&ifp=0](http://seekingalpha.com/article/3413626-heres-the-next-crisis-nobody-saw-coming?source=email_macro_view_eco_8_34&ifp=0)

### **Neutrino breakthrough**

Very fast Neutrinos?

<http://www.bbc.com/news/science-environment-33787562>

Are these faster than the speed of light yet? No-one is saying.