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## Better-Management Newsletter 13 November

**Geopolitics = Trump, Trump, Trump. Ditto economics. Then oil as a byline**

Everyone conveyed their best to Donald Trump on his victory except for a rant from Nicola Sturgeon...she is proving to be a nasty and mean spirited person and I am sure many of the people of Scotland would like to distance themselves from her tirade.

Then there are the German people...OMG J

<http://www.bbc.com/news/election-us-2016-37936207>

Trump's victory was based on the stats....

<http://www.bloomberg.com/news/articles/2016-11-10/trump-s-data-team-saw-a-different-america-and-they-were-right>

But the protest kickback should have been overcome by a mainstream candidate...just not one with a close association with the likes of Goldman Sachs and with Hillary's involvement in the Clinton Foundation's "pay for play" games as set out in Jerome Corsi's book, "Partners in Crime:...". Then there was Benghazi and the arming of IS and Al Qaeda. Many of Hillary's "usual Democrat supporters" deserted and for good reason.

The geopolitical implications of the Trump victory? From Stratfor...with thanks...

[https://www.stratfor.com/geopolitical-diary/rhetoric-and-reality-donald-trumps-foreign-policy?utm\\_campaign=LL\\_Content\\_Digest&utm\\_source=hs\\_email&utm\\_medium=email&utm\\_content=37413439&hsenc=p2ANqtz-txHnLuB3ULVgz4WICiW76FYEp1313qB2aLaHkbegD4dHMehHoCYU3bio2BCMql77LpFouj\\_167pS1w8mPPmrVfv2-xQ&hsmi=37414199](https://www.stratfor.com/geopolitical-diary/rhetoric-and-reality-donald-trumps-foreign-policy?utm_campaign=LL_Content_Digest&utm_source=hs_email&utm_medium=email&utm_content=37413439&hsenc=p2ANqtz-txHnLuB3ULVgz4WICiW76FYEp1313qB2aLaHkbegD4dHMehHoCYU3bio2BCMql77LpFouj_167pS1w8mPPmrVfv2-xQ&hsmi=37414199)

And

[https://www.stratfor.com/weekly/between-occasional-calms-democracy?utm\\_campaign=LL\\_Content\\_Digest&utm\\_source=hs\\_email&utm\\_medium=email&utm\\_content=37413439&hsenc=p2ANqtz-opibSsDiKuDMjes6idYneTnfL8iKcYfRISSDzx7fvd47\\_K6iPSHs1jvCsTRAK2JzNrYndRmWFJdxkvem7yCVqKZsS5Q&hsmi=37414199](https://www.stratfor.com/weekly/between-occasional-calms-democracy?utm_campaign=LL_Content_Digest&utm_source=hs_email&utm_medium=email&utm_content=37413439&hsenc=p2ANqtz-opibSsDiKuDMjes6idYneTnfL8iKcYfRISSDzx7fvd47_K6iPSHs1jvCsTRAK2JzNrYndRmWFJdxkvem7yCVqKZsS5Q&hsmi=37414199)

Has democracy been well served? Well, all OECD countries share one thing. They export of jobs to low wage economies has hurt the masses and not the one percent. Again, some views from Stratfor...

[https://www.stratfor.com/geopolitical-diary/foreign-policy-fertile-plains?utm\\_campaign=LL\\_Content\\_Digest&utm\\_source=hs\\_email&utm\\_medium=email&utm\\_content=37413439&hsenc=p2ANqtz-opibSsDiKuDMjes6idYneTnfL8iKcYfRISSDzx7fvd47\\_K6iPSHs1jvCsTRAK2JzNrYndRmWFJdxkvem7yCVqKZsS5Q&hsmi=37414199](https://www.stratfor.com/geopolitical-diary/foreign-policy-fertile-plains?utm_campaign=LL_Content_Digest&utm_source=hs_email&utm_medium=email&utm_content=37413439&hsenc=p2ANqtz-opibSsDiKuDMjes6idYneTnfL8iKcYfRISSDzx7fvd47_K6iPSHs1jvCsTRAK2JzNrYndRmWFJdxkvem7yCVqKZsS5Q&hsmi=37414199)

[m\\_content=37413439& hsenc=p2ANqtz--a04MRIZkAeSQEKCQUCH3YEsGjDlpnvB4YJU3zTfw8wWCXiqSFiy2oHHyCbCyZizgyYBdSEoCKETmnQWLcDhXu3S5SsQ& hsmi=37414199](https://www.foxnews.com/politics/donald-trump-republican-machine)

The Donald will not be given too much room to act by the Republican machine...again from Stratfor – pre election...nothing has changed though. (*Editor's note: the Republican 'machine' is changing fast to reflect the new reality - watch this space!*)

[https://soundcloud.com/stratfortalks/challenges-facing-the-next-us?utm\\_campaign=LL\\_Content\\_Digest&utm\\_source=hs\\_email&utm\\_medium=email&utm\\_content=37413439& hsenc=p2ANqtz--09If2\\_iZ8fEdCnhUD6BAut2M4\\_iq6f0WcWtldoxf3Fqrkj5vBM2KFp7k9oabz0GdyFasKodP0H6P-bPTOS\\_T5h67cUg& hsmi=37414199](https://soundcloud.com/stratfortalks/challenges-facing-the-next-us?utm_campaign=LL_Content_Digest&utm_source=hs_email&utm_medium=email&utm_content=37413439& hsenc=p2ANqtz--09If2_iZ8fEdCnhUD6BAut2M4_iq6f0WcWtldoxf3Fqrkj5vBM2KFp7k9oabz0GdyFasKodP0H6P-bPTOS_T5h67cUg& hsmi=37414199)

## The Economy

Perhaps Mr Trump is going to make America great again after all? The markets are happy there...from Seeking Alpha...

“**The Dow closed at a new all-time high** on Thursday as investors continued to embrace the Trump Trade, putting the index within striking distance of 19,000. But is the recent rally build to last? That's the question traders are now asking. While shares were heavily mixed across the globe in overnight action, U.S. futures are now starting to fade. “

On Friday night the Dow closed up further at 18,847!

But the USA drifts closer to crash time and I doubt The Donald will be able to do much about that....

[http://seekingalpha.com/article/4022195-midnight-america?source=email\\_macro\\_view\\_eco\\_1\\_22&ifp=0](http://seekingalpha.com/article/4022195-midnight-america?source=email_macro_view_eco_1_22&ifp=0)

In NZ with interest rates for residential mortgages being raised, the RBNZ has delivered what may be its last cut – perhaps a tribute to Donald Trump? (*Editor's note: but the main stream media remain petulant, publishing mainly leftish sour grapes articles - similar to Australia.*)

<http://www.interest.co.nz/opinion/84536/reserve-bank-has-delivered-its-last-one-and-now-it-done-next-move>

But the carry trade for emerging markets as well as those for Australia and NZ is starting to unwind. That may hit our share market very soon.

<http://www.bloomberg.com/news/articles/2016-11-11/carry-trades-collapse-as-emerging-market-yield-advantage-shrinks>

The pressure is now on to raise interest rates even in the USA, but can they? And will they?

We may soon see some very volatile money flows.

## **Energy**

Exxon is having trouble with reserve declarations because it has no money to replace reserves...

<http://peakoil.com/business/end-of-the-u-s-major-oil-industry-era-big-trouble-at-exxon-mobil>

Mind you, the Saudis are cutting down on projects too...

<https://www.rt.com/business/366015-saudi-arabia-scraps-projects/>

Even though OPEC can't seem to get its act together to manipulate prices.

[http://www.rigzone.com/news/oil\\_gas/a/147387/Kemp\\_OPEC\\_Plays\\_The\\_Chicken\\_Game\\_While\\_Oil\\_Prices\\_Fall](http://www.rigzone.com/news/oil_gas/a/147387/Kemp_OPEC_Plays_The_Chicken_Game_While_Oil_Prices_Fall)

Hmmm, US oil inventories are dropping faster than folks predicted...

[http://seekingalpha.com/article/4022166-u-s-total-oil-liquids-inventory-sees-large-decline-since-beginning-q3?source=email\\_macro\\_view\\_com\\_0\\_16&ifp=0](http://seekingalpha.com/article/4022166-u-s-total-oil-liquids-inventory-sees-large-decline-since-beginning-q3?source=email_macro_view_com_0_16&ifp=0)

A quick look at potential chokepoints for oil movements....

<http://oilprice.com/Energy/Crude-Oil/World-Oil-And-Its-Seven-Biggest-Chokepoints.html>

Chris Nelder was right in 2011 when he commented on the “politics of less”, but many never saw it and denial became the operative mode for the mainstream media, the economists, bankers, the politicians and those in power. Then came Trump....what next ?

<http://www.zdnet.com/article/occupy-tea-party-and-the-politics-of-less/>