



neverhadaboss.com
updates on the insane world of money and power
Dollar Ponzi—Revealed

If you're thinking of buying a new Honda, best do it now. The Japanese economy is falling apart. After years of negligible interest rates, inflation in Japan is running rampant and Japan needs to raise rates to keep it under control. But they can't because the Japanese are broke, without recourse—soon to be the thorn to pop the US dollar bubble?

How it worked for decades was Japan investing its dollar reserves, trade surplus into US paper, that proved beneficial to both nations. To where today, Japan has more than \$1T in US bonds. Now they need those dollars to pump into their own economy. But that is no easy feat. Where they to sell rapidly, the dollar/US economy could collapse—wreaking havoc on imports and exports—jeopardizing the entire global economy.

Fact is, no matter what happens, goods from Japan are going nowhere but up in price—with dire consequences globally. Flights from Japan for 2026 are to be cut, 20%. Meanwhile, the new, Trump cloned, Japanese leader, threatens war with China.

Back in the States, Bessent is lying about the Japanese relationship to the US, depicting a bed of roses. When asked, he resorts to absurdities: 'It's not the dollar going down—it's other currencies going up.' C'mon man, what you take us for?

With the end of the petrodollar, the US has come up with a brilliant plan that will ultimately fail—StableCoin. As when the petrodollar pushed the world into treasuries, the plan is for StableCoin to do the same. For the plan to work, a couple of things have to happen: StableCoin needs to be global because the US only has \$5T in savings—not enough to balance-out \$38T of debt. So, for the massive amount needed for the Genius Act to pan out as genius—the rest of the world will have to get on board, as they did with the petrodollar, willing to buy-into the world's most liquid asset, US Treasuries.

What's the problem for StableCoin and the dollar? The world is being asked to play both ends against the middle. What I mean by that is StableCoin on one end, the dollar on the other, and, in the middle, global perception over viability for the US economy.

Can StableCoin replace the petrodollar? Is the requisite global faith there about the US economy? Will they flock into StableCoin, knowing the dollar is weaponized—not in their favor—with a precedent to have their assets (treasuries), seized, and bared from the Swift system—at US whim? Are they in fear of the US after the Russian Forex theft?

They are and are wary to the point that 1/3 of all trade is now done in the yuan, which is exchangeable for gold. On top of that, the world is witnessing a rise in the US deficit, to \$689B, 18%, year on year—the worst rise in history. The world knows that all the blather about US spending cuts was simply that. Elon's DOGE savings resulted in making it worse.

No matter the extent to which Bessent misinforms, *Trump's Wide World of Shakedown* only serves to alienate the US across the globe. The world is going to give Trump \$17T, taken directly out of their stressed economies? Naw, they're just messing with him. There's no written agreements, just a wink and a handshake. And maybe a hope that before they have to ante up,

Trump will be gone/dead—or the US economy will have collapsed.

The dollar Ponzi rests on the US prevailing as the reserve currency, unipolar hegemony—which has a zero chance. Underlying that plan is for the US to be the big winner in AI, which cannot happen because China has the manufacturing base needed to implement AI, cheap electricity to run it, and is offering its AI protocols as open-source.

Unless the US backs off, and it will not, this ends in war—just as it has each 70 years. End of empire, ends in world war—by default. And unlike days past, this confrontation, considering the hubris of Israel/US, measured against the might of China/Russia/Iran/BRICs, portends something unimaginable for the world—especially for a complacent US population.

If you care to be reminded just how nefarious the West is, think on how long Russia (Soviet Union), has been cast as a subhuman enemy—not matter what peace proposals they put forth. Prior to WW2, Stalin, before any nonaggression treaty with Nazi Germany, offered France/Britain a mutual defense agreement where, if one were attacked by Germany, the others would come with military aid—declaring war on Germany.

The West refused, and we know the history from there. For a geopolitical parallel now for what happened prior to WW2, recall the war between the Soviet Union/Finland. Like Ukraine (before NATO/West earmarked more than a million Ukrainians to die), Finland/Russia had it all but settled, but France/Germany worked to keep that war going. Do you see any parallels? In a blow to US credibility, Ukrainian troops contemplate a march on Kiev.

With the contention between StableCoin/US asset-dumping, how is that playing-out in the States? What does it mean when the perennial haters of gold, Wall Street, recommends a portfolio of 25% gold? It reflects fear for the US economy/dollar has finally reached the ears of monied interests—

an admission that things are not well.

Wall Street is aware of the most massive drop in home prices ever listed on Zillow (larger than 2008). The average home price-cut is \$25K in a market where it's mainly rich buyers. Some cities are seeing price drops of \$50K. This is now a buyer's market—but with most Americans are still priced out of the market. Why is that the case?

With little or no savings, those who do buy use FHA with a requirement of 3% down. When they are laid-off and can no longer pay, they simply walk away, such that foreclosures are up 23%, year on year. And, if they can service the mortgage, other costs are driving them out. The average price of home insurance now amounts to almost 10% of mortgage payments—the highest price in recorded history. And, making it worse, homeowners insurance is projected to rise 8% a year. This does not end well.

The elephant in the room is precious metals. We waited for decades for the gold/silver ration to come down. Now it has and is. To put this into some perspective, I began buying silver, decades back, at \$8 an ounce. Today, at one point, silver was up \$3.56—rising almost half over one day of what I paid for my first purchases. This marks the turn.

With the US (West), economic situation worsening as we speak, where is this going? Have we reached the abyss? Will we be looking at \$200 silver, \$10K gold in 2026?

Get my articles by email with a request, or comment:
erik@neverhadaboss.com. Thank you.