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Silver Up 7 Bucks—Is Not Business As Usual

Begin with my default economist, Bill Holter, who yesterday, again made the point that inflation is our future. Later in the day, making my 3rd, 80 mile drive to load up on free concrete siding, ordered non-returnable for a building project, I tuned-into a mainstream, institutional economist, analyzing the US economy from charts, contrasting the price-rise in gold with the price-drop in price of oil—as the cause for a coming deflation.

The price of gold, compared to the price of oil will cause neither inflation nor deflation. Instead, an out-of-control price rise for gold/silver caused by dollar weakness tells a story that ends in all-out dollar printing, before mass inflation and dollar collapse.

This morning, I called some who keep large bank balances to warn them. Though I can't know for sure, a daily gold price up \$30/100/silver up 2/7 bucks, this is the right time to get dollars you can't afford to lose out of the banking system. If mortgages are owed, pay them down. Or, at least, secure your dollars—in your own possession.

It's the same premonition as when I warned my son to hurry an escrow, when interest rates were getting ready to double. Now, economic mayhem could close the banks. That economic chart analyst, lacking an overview of geo-politics, sees deflation as the only logical outcome—for conditions

where (hyper?),inflation, is the certainty.

Deflation occurs when prices fall rather than rise because of decrease in currency supply. That is not likely to occur with the dollar losing purchasing-power. Deflation may occur in some parts of the world, but with so much tied to the dollar, that's also not likely. When the dollar goes down—that rocks the boat. Maybe, if the *Gates Foundation* (WEF), gets its Malthusian way and we see a massive die-off—now that's deflationary.

Uncontrolled creation of dollars (made of nothing), assures inflation as our future. With gold/silver likely to double in price, understand the dollar to be in big trouble, requiring massive printing before the end. End it will, in mass hysteria, but before then, gold/silver holders will come under attack—accused of bringing down America/dollar. Signs are everywhere that the US economy is coming apart—black swans that could do it are all around. Trump, in his grab to steal assets, is talking again this morning about taking Greenland, while supporting Mega AI centers purposed to benefit the big boys—have the little guy pay with huge electric rates. Mega AI centers will do nothing for the average American because, unlike China, we don't have small business productivity that can benefit from Mega AI. And we haven't electric grids to sustain Mega AI.

Another vital question has to do with focus shift to the Americas. What is so important for the global economy, especially in South America? I'll leave that until next time.

Our economic chart pundit, weighing inflation/deflation, doesn't understand Trump's *art of the deal* to be a zero-sum game—Trump benefits because somebody else loses—opposite to the BRICS economic model for sovereign nation partnerships. With Trump there are no principles: he's ignorant, in fear for his life, or both. Unwilling to *bite the bullet* to end the

Ukraine War, he conducts out-of-control hubris—across the globe.

To pay for his misguided adventurism, the debt under Trump continues to grow at breakneck speed, creating dire conditions where government attempts to service ever-growing debt—in competition with US citizens for needed dollars. An increased federal spending, circularity cycle will result in higher taxes to fund greater debt-service needs.

With Trump lying about a strong economy, I implore my friends to buy a bag of pre-65 silver dimes to protect their families—at giveaway prices. One simple indicator: the fact Americans can longer afford to eat-out. Chipotle's business is down 44%, year to date—bankruptcy numbers that pervade the entire economy. Still, Trump acts-out grandiose hubris for make/break, AI. How's AI Mega Center funding going? Oracle (1 cog in circular Mega AI funding), fell 7% over 1 session of trading. Oracle's stock has fallen 50%—causing consternation among AI Mega mission funders and proponents.

You can't fool all the people all the time—and things are bad: Healthcare accounts account for 26% of 2025 spending—numbers that could well be higher than reported. Employer-sponsored health insurance is costing \$27K a year, as 125 insurance companies request increases of 50/100%. Only 4 forecast reductions. Does that mean employer health care could rise 50/100%. You gotta ask—where's the breaking point?

Trump is selling weapons to Europe to support Ukraine in a US sponsored, hopeless war with Russia—wherein Trump isn't insisting the EU idiots seek peace. What's the deal? Until recently, the US subsidized the Western defense tab in exchange for influence and control—using foreign-aid dollars that often came with fatal strings attached.

The questions that matter: why, after decades when Putin was no threat, are American troops still in Germany? Why does Trump want Europe to pay-

up to defend against a phantom enemy, Russia, created by the US? There is no NATO without the US.

Trump could end the war in Ukraine by telling Starmer, Macron, Merz, Zelensky, that it's over—then calling Putin and agreeing to principles of UKR neutrality, no Nazis, Russian-speaking regions of UKR as Russia, and an overall security treaty with EU.

That might yet be the outcome but 10s/1000s die—proceeding at a tortoise pace. And, because there's no plan, there's nothing to rely on. With Trump's favorite threat, tariffs, changing each week there is no supply-chain stability. There's nothing global business can rely-on as to their future. This results in serious diminution of world trade.

The US, without imaginative vision, continues to make thing worse—more dangerous. Just the fact that Trump has not responded to Putin's offer to extend the 'New Start' treaty for 1 year, tells us 1 of 2 things: he doesn't care or sees himself in the 'catbird' seat. He can just ignore the Russians—maybe he responds if he feels like it.

Trump has crossed over the line of sanity—a narcissist of magnitude previously unfathomable. I posit Trump to be little more than the consequence of the Obama/Biden horror. After Trump implodes, imagine what the left has in store for us—the equity to be rained-down on us. Until then—duck and cover for a dollar collapse. Take precautions.

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