



MACROVoices
with hedge fund manager Erik Townsend

Research Roundup - April 5, 2018

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This Week's Podcast:

1. Simon White: Equities are running out of road: [\[Click Here\]](#)
2. Transcript of the Podcast Interview between Erik Townsend and Simon White: [\[Click Here\]](#)

In support of This Week's MacroVoices Podcast:

1. Variant Perception Chart Book: [\[Click Here\]](#)
2. Variant Perception: Understanding Market Tops Report: [\[Click Here\]](#)
3. Post Game Chart Book - April 5 Update: [\[Click Here\]](#)

Written by Our Listeners and Past Guests:

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1. VARIANT PERCEPTION: FADE BOC RATE HIKES: [\[Click Here\]](#)
2. Jesse Felder: Is FANG Cheap?: [\[Click Here\]](#)
3. Jeffery Snider: Curse of the Zombie Junk: [\[Click Here\]](#)
4. Jeffery Snider: Did China Really Win, or Did Everyone Lose?: [\[Click Here\]](#)
5. The Heisenberg: From Inflation To 'Quantitative Failure': What Are Credit Investors Most Concerned About?: [\[Click Here\]](#)

Other Interesting Research we found for you in this issue:

1. Oilprice.com: 2018 Oil Gas Projects Break Even At 44 Per Barrel: [\[Click Here\]](#)
2. Breslow: "Everyone But Me Seems Sure They Know How Things Will Play Out": [\[Click Here\]](#)
3. Canadian Real Estate: They bought their prebuilt homes at the markets peak now they face financial ruin: [\[Click Here\]](#)
4. Toronto home prices see biggest drop in almost 30 years: [\[Click Here\]](#)
5. Blain: "Yesterday's Rally Was One Giant Short Squeeze, More Pain Is Coming": [\[Click Here\]](#)
6. Nomura: If S&P Hits 2535, CTAs Go "Max Short", Sell \$100 Billion: [\[Click Here\]](#)
7. Russell Napier: "The Fed's Ammunition Just Ran Out": [\[Click Here\]](#)

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