

Extreme outcomes are easy to imagine and often dominate attention in uncertain times—but they rarely fully materialize.

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AI capex arms race continues to accelerate. The companies that build and supply compute will dictate access, pricing, and deployment speed.

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The US's new tariffs have shaken up the global economy - but the AI boom is helping to hold things together

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“Scepticism often spikes at the top — but it also tends to keep investors from participating in ongoing structural shifts.”

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“Inflation is easing, equities remain resilient despite short-term volatility, and rate cuts are now firmly on the table.”

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