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The emergence of corporate L1s changes the liquidity map. If Stripe's Tempo gains traction with merchants, you'll see predictable, high-volume flows, which is great for low-risk, yield-capture strategies. The volatility and the asymmetric opportunities will still be in the permissionless frontier, however, where protocol changes, governance shifts, or market narratives can swing valuations overnight.

A real-world example: El Salvador made Bitcoin legal tender in 2021 and chose steady accumulation instead of headline-grabbing bets. On Nov. 17, 2022, President Nayib Bukele set a simple rule: buy one Bitcoin every day — a transparent routine anyone can verify.

Funding (perpetuals): Perpetual futures don't expire, so exchanges use periodic funding payments between longs and shorts to keep prices aligned with the spot market. When funding turns strongly positive, longs pay shorts — typically a sign of crowded long positioning. Deeply negative funding indicates the opposite: crowded shorts. Extreme readings often precede mean-reverting moves.

China's rare earth mineral export controls prohibit the sale of the critical minerals to the US military industrial complex, which backs the value of the dollar through military force, Gromen told Marty Bent, founder of Truth For the Commoner (TFTC), on Sunday.

However, in response, "Wall Street created products that made the dollar dominant, and the market cap of equities today is 40 trillion compared to 2 trillion for gold," he said.

Larry Fink's flip on Bitcoin

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