



SAVE THE DATE: LIVE Q&A WEBINAR WITH JIM MELLON

MONDAY 14TH SEPTEMBER | 1PM BST

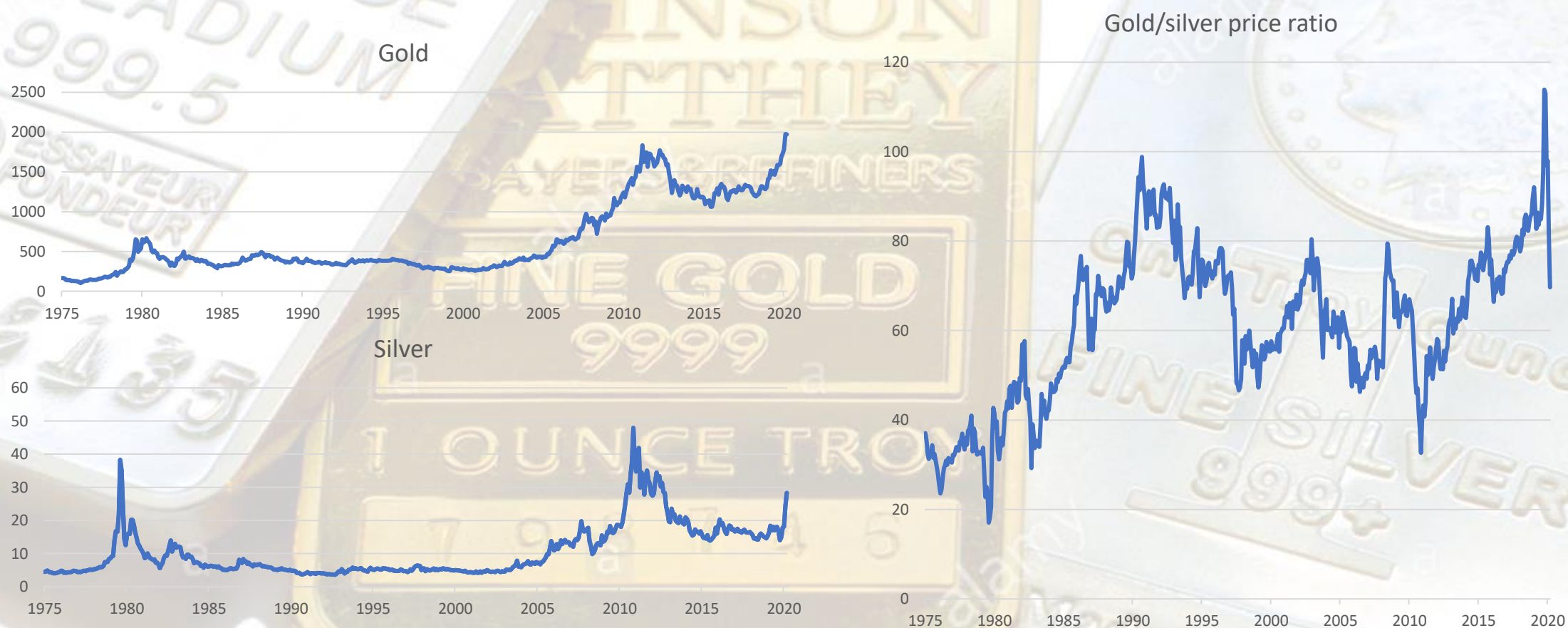


Unprecedented Money Creation

G4 Central Bank Balance Sheet



Gold and Silver Price - Almost Parabolic



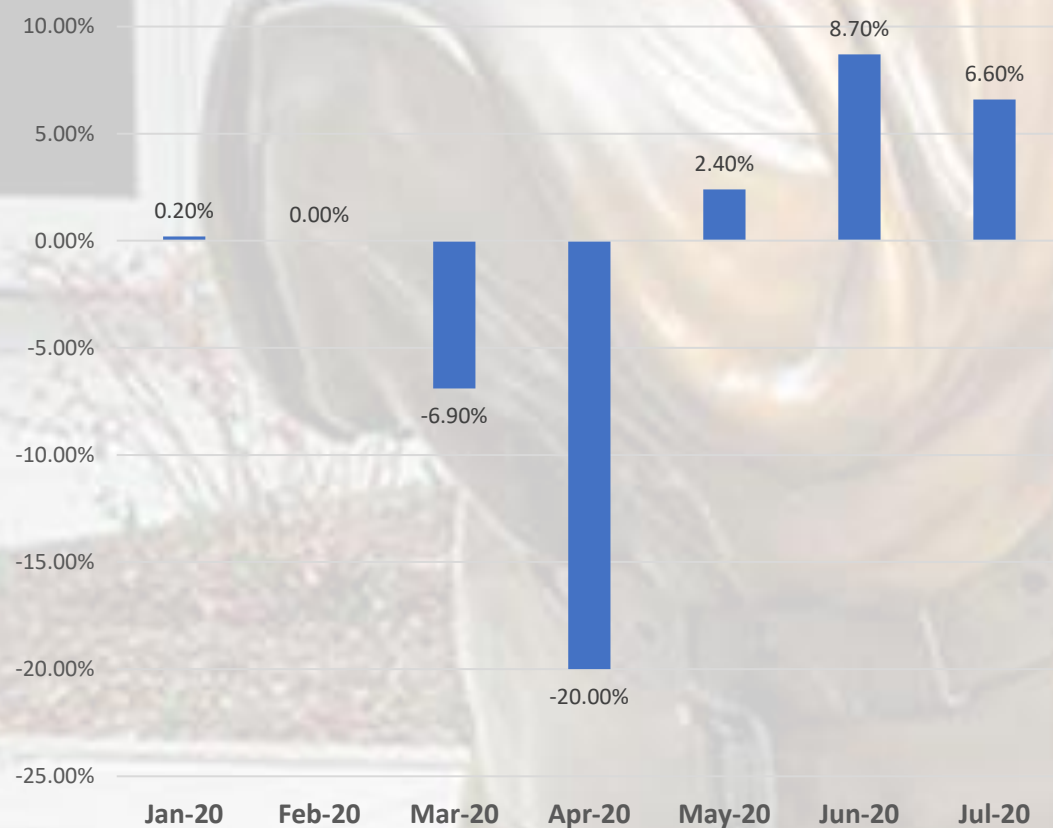
FANGS vs US Cyclical Stocks



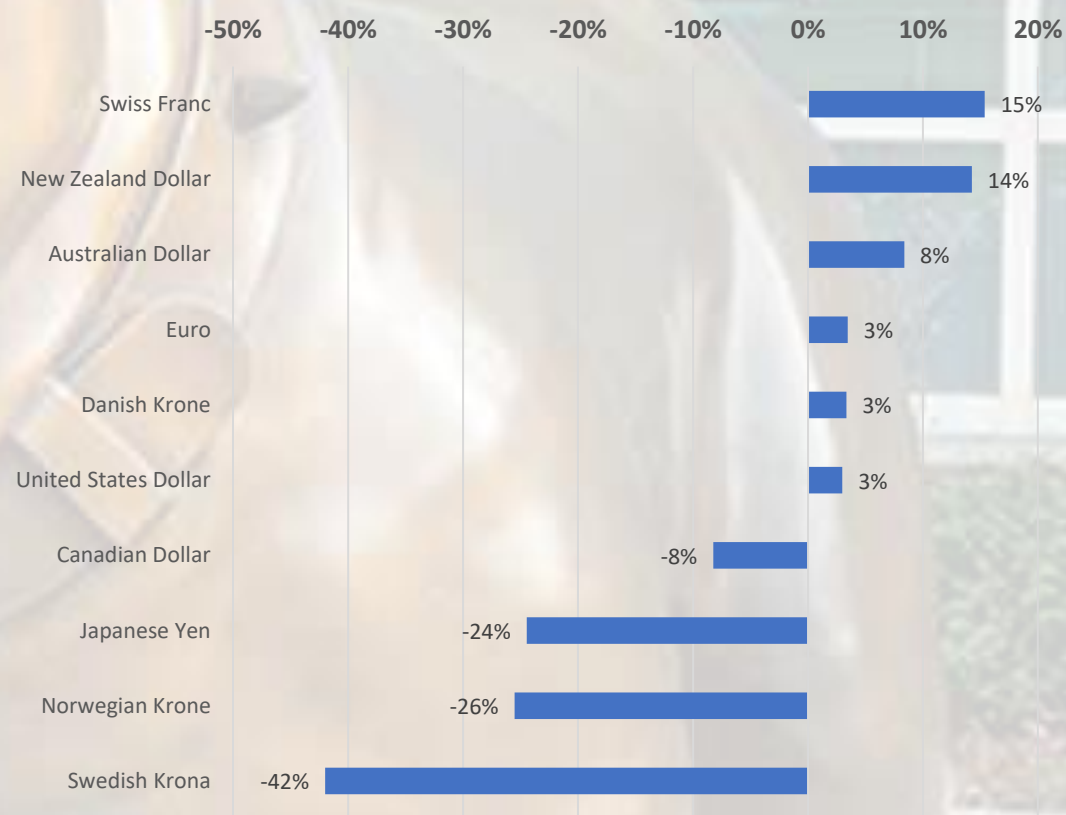


UK Recovering Quickly

UK GDP Growth



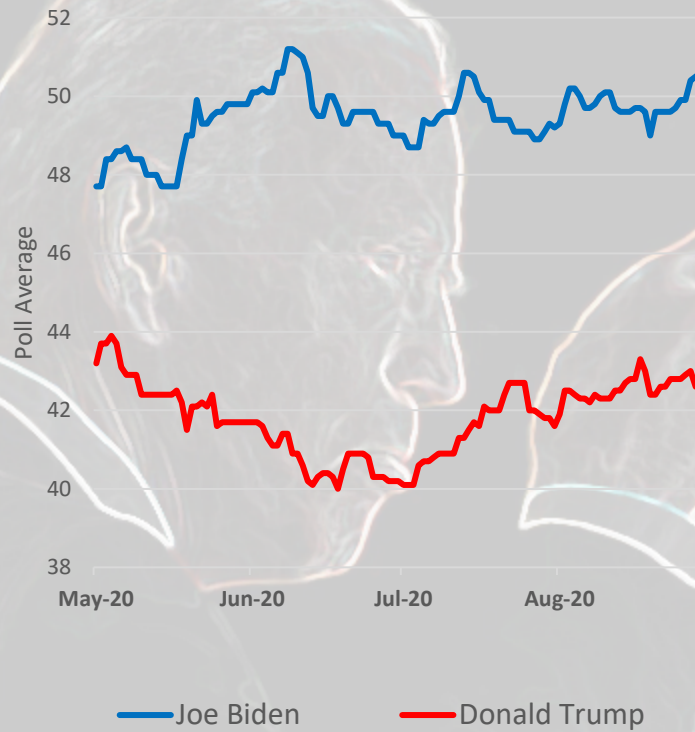
GBP on Purchasing Power Parity Basis





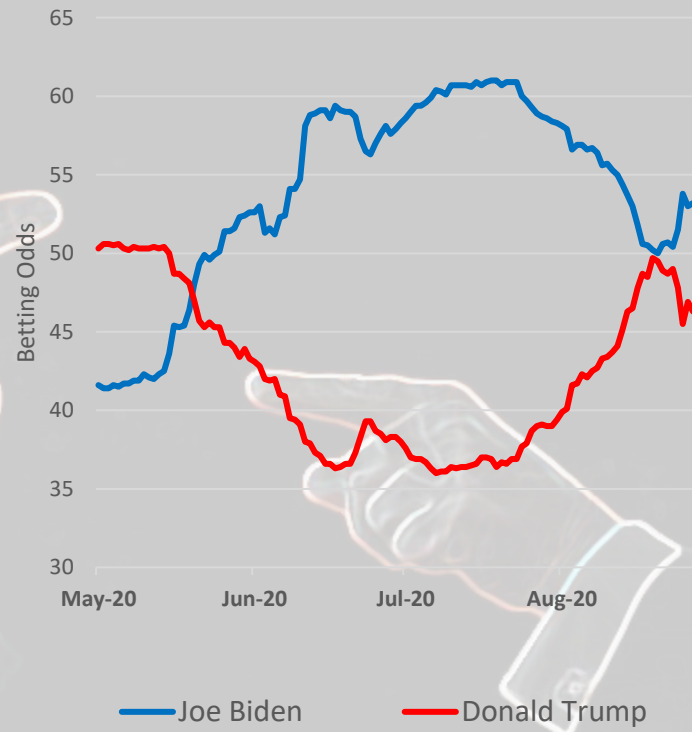
Polls and Odds Point to Biden Victory

2020 RCP Poll Average



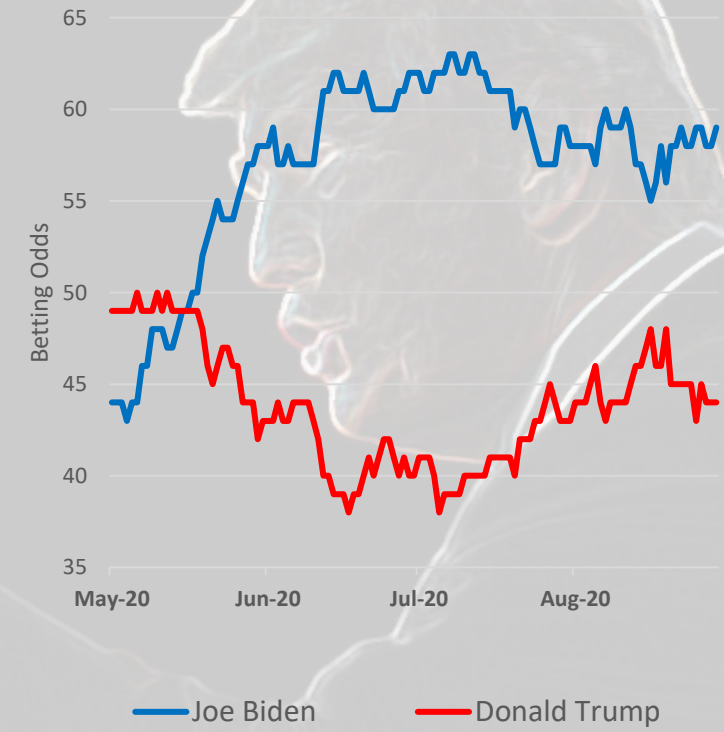
Source: Real Clear Politics

RCP Betting Odds



Source: Real Clear Politics

Predictit Betting Odds



Source: PredictIt

Stock Ideas

Name	GICS Sector	Country of Incorporation	Market Cap (\$m)	Yield (%)	Forward PE	1-month total return (%)
Rio Tinto PLC	Materials	GB	108,166	5.92	11.66	6.30
Royal Dutch Shell PLC	Energy	GB	106,821	5.02	10.03	-7.17
TOTAL SE	Energy	FR	102,378	7.74	12.83	-2.91
SPDR Gold Shares	#N/A N/A	US	77,924			-0.05
BP PLC	Energy	GB	68,469	13.23	9.16	-10.17
Anglo American PLC	Materials	GB	31,414	3.05	9.82	5.16
Schlumberger NV	Energy	CW	24,805	4.73	26.55	-10.36
Pioneer Natural Resources Co	Energy	US	15,125	2.33	18.98	-16.85
Repsol SA	Energy	ES	12,459	14.52	7.29	-7.58
Evraz PLC	Materials	GB	6,190	7.70	6.62	-0.02
Diamondback Energy Inc	Energy	US	4,675	5.06	9.17	-34.92

Stock Ideas

Name	GICS Sector	Country of Incorporation	Market Cap (\$m)	Yield (%)	Forward PE	1-month total return (%)
Centamin PLC	Materials	JE	3,124	5.00	15.18	4.53
Global X Silver Miners ETF	#N/A N/A	US	1,116			0.30
Pan African Resources PLC	Materials	GB	689	2.92	5.06	-2.04
Sandfire Resources Ltd	Materials	AU	607	3.01	11.58	-3.21
Fidelity Japan Trust PLC	#N/A N/A	GB	325			7.35
Condor Gold PLC	Materials	GB	76			0.00
Horizon Minerals Ltd	Materials	AU	50			-10.00
Pasofino Gold Ltd	Materials	CA	30			-17.65
Venturex Resources Ltd	Materials	AU	23			-2.38
Dart Mining NL	Materials	AU	10			-1.80

N. Y. STOCK EXCHANGE.

Put's Call

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R. SAGE.

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JAY
GOLD

