You Think You're Watching a War. You're Watching a New World Being Built | Simon Dixon Hard Talk

Did you see what happened between India, Iran, Russia and China at the Shanghai Cooperation Organization meeting SCO, at the exact same time as the announcement the opposite way in G20? I think that sets the framework for what's coming next in the BRICS Summit. But also, did you see the Venezuelan deal? It was so different to the reality and how it impacts you, while Netherlands is moving their gold over to London. What do you need to do to protect yourself? Let's break it all down this week in Simon Dixon Hard Talk Live.

Hey, hey, sovereign wealth builders, Simon Dixon here and welcome to another episode of Simon Dixon Hard Talk Live. We're on the move, so we haven't got the perfect sound, but the content is what matters because the title of today's episode is that you think you're watching a war, but you're watching a new world being built. We're going to check in on everything that happened this week, and we're also going to go over to one of my live interviews that I gave just yesterday.

So part one, what are we going to be covering? Well, there was massive news in the SCO meeting, and India, China and Iran just sent a major signal that we've got to interpret. And then we have the BRICS Summit next as well. So we're going to be going through all of that, as well as the Venezuela updates and the latest in the Iran side and everything that's happening in the markets.

In part two, I'm going to be answering some questions from a podcast that I was recently invited to. And the topic was Israel's being privatized. We were discussing what's going to happen to Israel in this new order that's being built.

And I was also sharing what I think is happening, what deals are happening, and how Netanyahu is likely being left behind, but it depends upon the sequencing with the Iran War outcome. That was my interview with Wali Rashid on his YouTube channel, and we're going to be premiering that right after part one, where we cover everything that happened this week. So let's dive right in with the market check-in.

The bond market, as I've always been mourning over the last couple of years, and particularly since the breakout of the Iran War, is to watch the bond market. The bond vigilantes are telling us the story. While the Federal Reserve can control the short-term rates, the long-term rates are determined by bondholders.

And guess what? The Federal Reserve is owned by the Financial Industrial Complex, and the largest bondholders are the Financial Industrial Complex. So they own the market, and they can dictate policy. Well, what are they saying? They are saying, if we are to lend to the US government for 10 years, we now need 4.76%. I was saying, whenever it's above 4.5%, you need to look for signs of serious stress.

And that stress in this fiscal dominance environment, where the government prints money to stimulate the stock market, but bondholders are pricing in higher risk, is exactly what we're seeing right now. And the outlet is in gold, Bitcoin, and other fixed supply assets that we're starting to see early signs of right now. But the stress behind the 10-year bonds is oil prices, and oil prices are determined by the shape of the world order, which is bounded escalation, which is why we need to look into the geopolitics.

The 30-year, to lend to the US government for 30 years, they need 5.24%, 5.25%. But what is really happening is everyone connected to America, the network connected to the Bank for International Settlements, whether it be the Bank of England, the Bank of Japan, the bonds in France, in Germany, across Europe, across the allies of the United States, they're all blowing out as well. And Japan, significantly, we've been covering over the long term, the 10-year yield in order to lend to the Japanese government, it's up to 3%. Now, that has a very different implication because Japan has had that lost couple of decades.

And that is as a result of the Bank of Japan using the Japanese economy as a note for cheap credit for hedge funds. It's called the Japan Carry Trade. When you push it up to 3%, that decouples the Bank of Japan policy from the Federal Reserve policy, or it's coordinated by the Bank for International Settlements in order to manage capital outflows.

So rather than Japanese investors, and while we talk about Japanese debt being like 250% debt to GDP, remember who Japan is, who's the largest holder of Japan's debt? It's Japan, it's the Bank of Japan, it's the Japanese financial industrial complex, it's the pensions. So it's a very different position to the foreign debt held by US. So now when they're moving the rates to 3%, which is the highest since 1996, that is a change of policy.

That is saying to Japanese investors, no longer borrow 0% from us to invest in US treasuries, the basis trade, which is why Cayman Island is the largest lender to the US government by the Japan Carry Trade, instead lend to us. So this is decoupling of the Japan Carry Trade. At the same time, we've got the stress in the petrodollar as a result of the war and the divvying up of financial centers around the world through what's known as the euro dollar, which has nothing to do with euros.

But what is the relief out for all these foreign countries and central banks? Well, it's gold. And so gold has pushed above approximately 4,500 again, and Bitcoin is starting to push up above 81,000 from a low of approximately 60,000, 62,000. Where is the stress that we're seeing? Well, DXY, which is US dollar relative to Western aligned currencies or strategic trade partners of the dollar, that's hovering around that $99 mark.

So it's still below the 100 mark off its lows of this recent lows of about $96 prior to the war, but below its peak of about $103 that was a peak dollar strength. So slow burn in terms of the DXY side. But of course, the S&P 500 in fiscal dominance, you sacrifice world reserve currency, you roll over the debt and dump the debt upon everyone through accelerated inflation and you invest it into the stock market and the S&P 500 is pushing closer to those all time highs of $7,748.

If it breaks the $7,850 level, we're back up to new all time highs. And where is the vast majority of that money going? Well, of course, it's going into the AI and robotics trades, which then leads to significant unemployment, productivity gains for the largest companies and a significant acceleration of that K-shaped economy that eventually leads to my long term thesis of a universal basic income for those that are priced out of the assets and severe K-shaped wealth inequality for those that own the assets and your job, which I actually shared in part two of how you can protect yourself from that in the interview. Meanwhile, where's it coming from? Well, it's Brent Crude Oil as a result of the bounded escalation for the negotiation that we're going to be discussing a bit more on what happened this week.

We had Brent Crude reach a peak of about $97. It's now around about $95 to $96. So a slight correction of that and the U.S. Strategic Petroleum Reserve, because in order to control the price of oil, U.S. was releasing its reserves onto the market, as well as China being the most significant by determining how much it's importing.

Now they just got the largest oil reserves in the world that went to approximately 287 barrels, which is the lowest since 1982, significant date, because that's after the fallout of the oil embargo that happened in the late 70s that led to the creation of the metro dollar and the order that is slowly being tested right now through the pegs in the currency from dollars to the Middle East and Gulf countries, which are having to defend the peg as the currency gets weaker, which means selling off gold or selling off treasuries in and any at some stage when those pegs get removed. If the dollar continues to weaken, that's how you fully put a a death to the end remnants of the petrodollar relationship. But most importantly, while all this is happening, Bitcoin and gold were showing strength as well.

But what is happening? Long term yields are having the blowout. That's where I said all the stress would be in the bond market. And we're really starting to see that acceleration now until eventually you can only control those yields by Treasury intervening.

And we had some Treasury intervention and Scott percents going round like a headless chicken leaving comments out there. But Scott percent and wash are just simply conduits of the financial industrial complex, as well as Trump setting the destabilization of America, shrinking it into a regional power and deconstructing everything that that propped up the petrodollar with, you know, his destabilization of America while pumping all the value into the stock market and basically phasing out world reserve currency. Both wash Bessent and Trump all nodes for the financial industrial complex, as well as Howard Lutnick as well.

So bond market keeps pushing yields back up, even despite what the center is saying and the

Treasury intervention. So we either get higher Treasury intervention, which is if you remember last week, we covered it. It's taking those longer term yields and refinancing in the short term.

But when the Fed starts buying, that's quantitative easing. That's new money creation. The banks get to purchase those bonds.

The Fed balance sheet increases and the shareholders of the Fed are the financial industrial complex and the banks that clear into the federal reserve system. So governments can intervene, but the bond market is deciding and it's the bond vigilante that decides whether they accept what's happening. And so the bond market right now is saying we don't believe you, Bessent, roll over more on the short term.

We want some of those short term rates. We don't want to lend too long. And that's having big impact on the markets, which are connected to the 10 year and 30 year, which is mortgages.

And so mortgages are up to seven percent for anyone refinancing now, which causes stress in the banks collateral, which is also connected to commercial real estate and private credit to a lesser extent. But these are markets that we continually follow. Now, the most important thing by long term thesis has been that emerging market currencies, when they have metals, when they have resources, they're outperforming the dollar.

And we're starting to see more strengthening as the dollar weakens and vice versa. Those currencies that don't have metals, don't have sovereign wealth, aren't players. They're weakening relative to the dollar as well.

So we'll continue to watch the bond market, gold, oil, the dollar. We can ignore narrative. That's telling us.

And again, stress in the bond market, acceleration of gold and oil is indication that that of the escalation that happened in Iran. But until we get major blowouts of oil above 115 again and gold continues to rise in sync, then we can start to think about whether this is actually a war that is going off rails or on land. Right now, I think it's bounded escalation into a negotiated outcome that resets the world order.

So ignore the narrative, ignore the day to day watch the money. It's the people that really control the markets that know what the military industrial complex, financial industrial complex and technical industrial complex are negotiating. So that's the markets.

Now, let's look at what's causing those issues, which obviously is what's happening in the Middle East, which is, you know, are we leading to other missiles are they genuine escalations of war or are they negotiation? I still believe that this is negotiation. And remember, one of my long term thesis has been is that this is the MiG swiping up the last profits it can while using its leverage to get a better deal for thick financial industrial complex, military industrial complex and also get those technical industrial complex tick contracts. Then who rebuilds determines the shape of the world order.

Who invests in Iran, who invests in Lebanon, who invests in what's happening in Palestine, Israel, all of these regions, Syria. And we started to see significant movement in Syria and Iraq while this was happening. So let's see.

Let's have a look at it. So, you know, and for those that are new to the show, this has been my long term thesis since China normalized between Saudi and Iran, which was back in 2023. Before the escalation of October the 7th and many of the lies and BS has happened that has led to where we are right now.

But the Middle Eastern Forever War model is coming to an end while most people think this is either an escalation to World War Three or the Forever War just being business as usual. But this is not that type of escalation because the markets are telling me. And whenever I look at it, take a zoom out.

I see a change which I've never seen in my lifetime. And this is simply bounded escalation towards settlement. So the we had this week, significant retaliations against the US from Iran.

There were Saudi assets that were targeted in terms of oil tankers. None of them were sunk in order to create some kind of disaster in the region. But they were targeted and the region is still in my eye settling rather than, you know, there's there's lots of territorial posturing into this new world order, but nothing that's leading to an all out regional war.

So the Gulf States have been hosting US bases and we've been watching the outsourcing of the destruction of US bases to Iran and Iran has been doing an incredible job. So we got more retaliation from Iran. So the sequence of events is US comes in and they attack.

Then Iran retaliates by destroying US bases. And then the Gulf countries get to renegotiate their terms and the mikfik and tick get additional revenue from meeting some of those short term needs. And you get to drain the US of all of its mikfik you know, reserves.

And then you get to Lockheed Martin general dynamic ratio. They get new contracts. Well, the fick negotiates rebuild contracts and gets as much leverage as it can, knowing that it can't penetrate China and China's at the other side of the trade.

And the mikfik needs China for its weapons. The fikfik tries to integrate with China in a multipolar world order. And the tick needs refinement and resources for its big bait data center build out from China as well.

So essentially, the Gulf in this normalization covertly, in my opinion, has been outsourcing the destruction of US bases in cooperation with Iran. And now we're starting to see some of those security umbrellas be announced. It's very sequential.

What we've been watching, it's actually really stunning to watch. For those of you who've been long term followers, let me know in the comments what you think, you know, whether we think we're on track, how we've been saying this over the years. And it's really stunning to watch.

But you have to kind of ignore the day to day short term headline distractions. So Iran says that the Gulf states are basically reaching out in order to add Iran to a new security arrangement. Now, there was back and forth, there was posturing.

But the important thing is that the Gulf governments haven't all publicly committed to this yet. But what have they done? Well, they signed the Mecca agreement. We'll go to that in a little bit deeper.

But first, we need to see what's happening around the region. So in order to replace MIC from the Middle East and Forever War, you need a regional power because there's no one country in the Middle East that is able to provide a replacement for what was forced on the Gulf countries through the Petro dollar. So if you remember, just a quick recap, the Petro dollar after King Faisal was assassinated as Israel escalated.

There was a retaliation. There was an oil embargo that created a real crisis because America was very and the West were very independent upon that oil less to the degree that we are today. Then you had Safari Club with George Bush, which was covert operations to groom Osama bin Laden and turn him into a CIA asset.

Then you had the assassination of King Faisal oil embargo, Petro dollar and the Petro dollar relationship was that we will price oil. Now, price is different to, you know, pricing and settling. So they will price and settle oil in dollars.

You can price in dollars and settle in another currency, but price and settle in dollars. And then those dollars will stay within the federal reserve system. They'll peg the current their currencies to the dollar.

They'll agree to defend it, which is fine in a rising market that needs defense in the falling market. And then those those dollars will obviously purchase U.S. government debt and then the yield on the debt will purchase military equipment from the MIC and then the MIC will build bases and then those bases are used in order to enforce destabilization across the region and strategic tension through things like Operation Gladio. Now, that's what I believe we're witnessing the end of.

So what did the Gulf countries do? They started buying equities, AI companies, all of the different, you know, stocks and various other things. And they started settling in pricing in dollars, but settling in some alternative currencies as well and started hedging and building alternative rails like a network of CBDCs. Now, all couple that with what's happened in the war struck regions.

So in the forever war, you had Syria, you had Lebanon, you had Libya, you had Iraq. Now you have Iran, you have Sudan, you have other areas which are, you know, part of this war, death, destruction, rebuild, mikvitik, surveillance day. But as we're starting to see Iraq right now, you can see that there was a proposal.

So we had an agreement between Saudis, military, financial might. Turkey's military and manufacturing might. And Pakistan's nuclear and military substance and battle testing.

They signed an agreement. And then there was a proposal between Iran and Saudi and in Iraq, Security Coordination Council. So it's not quite Mecca agreement, but it's a coordination between Iraq, Iran and Saudi.

And in exchange for that, the US forces scheduled that they're going to be withdrawing from Iraq by the 30th of September. So we're getting more and more retreats from the US military side and then more and more agreements that are being signed up. Iraq basically describes this transition as military to economic.

What I would say and translate that in my terms is mik exit and fik remains. So this is the bounded escalation on the regional stability phase where fik tries to get as much leverage as it can. And so we started to see big shifts in Iraqi currency policy.

Firstly, there was a redenomination adding three zeros. You know, that's irrelevant. But there was also a movement towards digital currencies and so digital rails, which in translation is central bank digital currencies.

So the fik took over the Iraqi central bank and Iraq needs to apply for permission after the war in order to access their funds while the military were, you know, guarding oil resources. And then China started coming in and rebuilding and ending up about 30 percent of the equity of much of the oil infrastructure in Iraq. So this is basically the region taking responsibility for the security in a post-U.S. dominated Middle East.

And China wants stability because America is now an energy exporter, whereas before it was an importer, with the exception of the diesel crisis that we're seeing right now and its dependency upon Canada and Mexico. But what is Mexico? Mexico basically is Chinese factories. So Chinese factories and refinement capabilities in Mexico and that relationship between Canada and China and Europe is also being tested.

We started to see, you know, some of those tariff policies kick up again. But this is just, you know, again, how do you make America into a regional power? You destroy everything that propped up the petrodollar and made it a global hegemon. And you build an alternative after 1991 when the Soviet Union fell, which is the new BRICS GCC regional corridors in a multi-polar world that we're seeing right now.

But especially energy security is what's being negotiated here. And with the closure of the Strait of Hormuz, Iraq was severely impacted more than any other country in the Middle East. And so that gives maximum subordination, vassalization in these negotiations.

And Iran seems to be retreating, but there were additional border tensions. You know, but to me, it feels like Iran is allowing the different militia groups to integrate into their own security models and political integration models as we make this transition that we're witnessing right in front of us. The Gulf wants stability in the region.

Iran eventually will get its sanction relief and therefore wants to maximise its position. The MiC wants to make as much profits. The FiC wants as much leverage.

And China is the one where MiC, FiC, Tik, Gulf, Iran, and everyone is completely dependent upon. Now, when China wants stability, it wants to hedge its bets across the region. It doesn't want to be dependent upon dominant player.

And so what happens in the Strait of Hormuz? It's very important for Iraq, for the Gulf countries, for the Levant, for China, for MiC, FiC, Tik, for the world. And whatever comes out of that is going to set the world order. I do believe it will be a toll, in my opinion.

And I think it will be divvied up across different regional powers. There was a lot of posturing between Amman and Iran. That implies to me heavy negotiations.

So when you see public narrative around, oh, we're not doing this deal, we are doing this deal, that's just the types of posturing that are happening, in my opinion, behind the scenes. So things are moving on those stuff. Iran wants sanction relief and regional reintegration, which is the reformist part of the government.

And the military side is represented by IRGC. In part two's interview, I answered a lot of questions in terms of the implication I think this has on Israel. Now, Iraq wants that US military exit, but the price it has to pay is financial isolation.

So the FiC, with all that leverage and with all that subordination, China has massive access to energy resources. And the FiC is getting as much of those deals, knowing that Levant, Iraq, the Middle East, regional stability, will produce one of the growth, the biggest growth investment areas when you follow the money. So the outstanding settlement issues are, you know, that we need to get to a resolution on, is what does the toll booth look like on the Strait of Fames? Iran's sanction relief at the moment is temporary in order to control the price of oil.

But once you release that oil and you have that sanction release, how much is cleared in the Chinese yuan? You know, yuan, your petro yuan system, versus how much is forced onto FiC rails. Then you've got obviously the Gulf security architecture where we've had massive announcements and progress. Then the US military withdrawal and then the reconstruction contracts.

Those are really important. Once we see if there is a $300 billion reconstruction contract in Iran or not, who pays it? What happens in Syria, in Lebanon, in Gaza? That shapes what these negotiated outcomes look like based upon the bounded escalation we're seeing. And then economic integration, which is a multi-decade process.

And of course, the most important thing, Palestine and Israel. What does that dynamic look like? I've speculated and we cover more on that in part two. But don't mistake negotiations by missiles for the forever war, US dominance and the business as usual.

You've got to stop analyzing from the perspective of the previous world order. This is a transition to a new world order. And the rules of the past are not the rules of the future.

And many people in our entire lifetime will just be used to US dominance, forever war, Israel. And, you know, that this changes all of those games. The missiles are part of the negotiation, part of what needs to be destroyed, part of what needs to be rebuilt and part of what gives the leverage into the regional settlement and the price that I think we're moving towards of a post US Middle East that becomes West Asia again, post colonial era.

In line with that, we also saw that there was an announcement from President Xi visiting Egypt. This is the first visit to Egypt in a decade. So Egypt is incredibly interesting, obviously, the historical importance of Egypt dominating North Africa and our corridor, the Silk Road corridor between Middle East, the West and the East, the African resources.

And Egypt is incredibly important. It's very militarized right now, deep in debt, very subordinated to the IMF, but it's been refinancing with Gulf sovereign wealth funds and China's Belt and Road Initiative. And so when Egypt during and after October the 7th would not ethnically cleanse the Palestinians because the IMF said, well, pardon your 18 billion dollars debt and they held the fort that implies that Egypt was pointing more eastwards and who joined the BRICS? Egypt, UAE, Saudi as an observer, Saudi holds the key both in BRICS and the Palestinian Israel saying we won't normalize with Israel until there is a Palestinian state.

So it's the holdout in importance in the region. But Egypt joined, Iran joined, UAE joined. These are all the keynotes and we also had Ethiopia and Africa as well.

Very, very important strategic points here to join BRICS. Now, we've got the BRICS meeting next week, so we'll see what comes from that. Most people think it's a currency, it's not a currency.

A currency was a Goldman Sachs SIO that would have led to a blocked currency that could be controlled like the European Union. It's a political realignment into regional economic and security measures that are coming into place, combined with the SIO meeting, Shanghai Corporation

Organization, sorry, I get confused. SEO, anyway, you'll put in the comments what it is.

The Shanghai Cooperation Organization. There we go. Hopefully I got that right.

But Egypt controls the Suez Canal. One of the most important things, it marked the fall of the British Empire when the British Empire could no longer defend it. We had a nationalist uprising.

Egypt got to keep its resources and then it went through a massive, thick currency war. When it recently floated its currency, they were able to destroy the value of its currency and purchase much of its assets and vassalize it. Some of that went into Belt and Road, but IMF implemented massive takeover proposals.

We also had the 2011 Arab Spring, which led to the change in leadership somewhat of a Western puppet, but now changing in that stance based upon the new world order that we're seeing. So Egypt controls the Suez Canal. Iran controls Hormiz and then the Yemen and the African regions are the Red Sea.

These are the key strategic choke points. Whatever happens in the Strait of Hormuz, I expect to have big implications, which is why there was a lot of, you know, into more escalation between Saudi, Houthis, Yemenis army and again, bounded escalation to reach settlement and based upon the power dynamics that are being that side. So China has been very strategic here in terms of trade routes.

And it needs to make sure it's stable and it needs to make sure that it is distributed while it's also building a lot of its AI and robotic infrastructure that requires vast LNG and energy and is building all of its renewables, every form of energy, as well as having the largest reserves as well. It needs steady pricing. And it was really, you know, really controlling the price of oil throughout this whole bounded escalation with Iran.

So the China, basically Egypt, there was a defense relationship that hasn't been announced as formalized but is deepening and they were putting out press releases. And this was including basically a joint air force exercise between China and Egypt was the announcement. And more importantly, the Chinese tick, the technical industrial complex, which is subordinate to the Chinese government in the case of China, in the case of America, the government is subordinate to take me.

But Huawei is basically proposing a major AI data center infrastructure built in Egypt. Now, this is really important. Egypt is not just saying you provide the infrastructure.

It's actually building out its own data center. So Huawei is going around its regional partners building them up and also investing in the degree of autonomy while releasing open source code. I know it sounds like I'm some kind of China propagandist.

I'm just talking about how China is resisting. You know, once China becomes we'll we'll cover, you know, I'm trying to be geopolitically neutral here. But China is the major resistance of why this is actually happening.

America is the current order and the change is what's happening as a result of these things. So Egypt is diversifying its economically, technologically and militarily. Basically, while remaining connected to the U.S. through its legacy IMF, predatory currency war, fikmik and relationships, but leaning into the fikmik tick in the east on the Chinese side.

But here's what's important. China has been so far in terms of Belt and Road building countries up so that they can purchase their exports. Whereas the IMF, European-American model was to destroy countries through covert operations, take their resources, install public corrupt governments and then make sure that you can get all of the resources and force through military action people onto a dollar dependency and IMF and World Bank debt dependency.

China will probably do that, but I think the countries that have been colonized are better in their negotiations. And so if you ask China for something that supports your infrastructure, we're seeing so far that the countries that have leverage in terms of the resources that they have are able to get their data sensors and factories built in their countries, which makes them more sovereign, more autonomy, and say rather than us just giving you the resources build up the factories. And that's what all sovereign countries need to do.

And access to those resources is what's determining the power dynamics of those relationships. But China doesn't need to replace, you know, America's Middle East military empire because it is going more for a partnership model than a destroy, you know, destroy and rebuild contracts type of model that the West has traditionally followed across the Middle East, Africa, the global South and Asia. And stable region is what they want rather than the forever war model because it doesn't look like it's monetizing military at the moment.

It looks like it's monetizing building. Now, look, China is a very authoritarian government, no doubt, I'm not saying live there, but I'm saying what is the relationship between the countries, China, the FIC, MiC and TIC that's happening right now. But it's all about energy flows moving as we transition to this TIC global control grid with AI and robotics.

So Egypt is now seriously considering joining the MACA joint defense agreement. This is major. So Saudi has, as I've already said, significant financial results.

And by the way, there was a lot of news about the headline said Saudi is taking $8 billion loan in distress. That was negotiated as a $58 billion loan in January prior to the Iran war. They've got $497 billion of dollar reserves and dollar assets.

It's got $1.2 trillion within its sovereign wealth funds of assets, including much of the AI and infrastructure and data centers across America, as well as partnerships with China who's purchasing their energy. Now, is the closure of the Strait of Hormuz impacting them? Yes, it requires significant investment in alternative rails, which is what we're seeing right now. And it requires normalization with Iran, which is what the agreement that I think is going to be happening in this post-U.S. dominated world order.

But to have Saudi Arabia's financial might, as I said, so that $8 billion was just part of the $58 billion. Imagine you're an asset manager. You're managing your portfolio.

You have assets. America doesn't want you to sell your bonds. So you could either get like UAE got an FX swap line where you deposit your own currency as collateral and they give you dollar loans.

We've also seen FEMA agreements, which is where the U.S., in order to not sell your treasuries, they're basically giving you dollars in exchange for your treasuries so that you don't have to sell them. They're also looking, and so you've got those. Or you just don't sell down your assets and you take out a loan restructuring instead.

That's what Saudi's done. That's what it agreed to in January. Now, obviously, economically, these higher oil prices are helping, but the amount that they're able to export has been reduced, which have been factored into the equation.

So that's the Saudi financial might situation. There's a big bill of rebuild after this, whether it be investments in Levant, Iran, Palestine, it's Vision 2030. That's a lot of cash that's coming.

And this is the fixed leverage. And so the danger in these negotiations is that the sovereign wealth fund is providing the autonomy, the co-opting of FIC. The CEO of Saudi Aramco, which is the Saudi state-run oil private company that floated, is on the board of BlackRock.

So you can see the leverage being pulled. Their new centers are being built in Riyadh. This is the negotiation to get the mick out of the region, and you can see it happening in real time.

So what do you need then next? Well, a partnership with Turkey. So Turkey is building significant technology, drones, manufacturing-based strategic importance in terms of its historical route with the Ottoman Empire, and a significant military member of NATO. That's a bridge.

Now Pakistan has historically, it is currently ran out of dollars. During COVID, it famously ran out of dollars in terms of its dollar loans. And that got refinanced by the Gulf countries.

Now, by the Gulf countries refinancing it, they were able to play China's Belt and Road Initiative, but they are stuck between IMF historical debt, its need for dollars, it's refinancing with the Gulf countries, and also the China's Belt and Road Initiative. So Pakistan is very subordinate. So what asset is it leveraging? It's a military, it's battle-tested, it's nuclear-powered, it's a militarized country.

We had the arrest of Imran Khan, and we had the military Pakistan becoming more and more militarized as its strategic asset. So it's utilizing that strategic asset. It became a proxy for China for the negotiations with Iran.

Now, what is very important here is that they call it the Mecca Agreement. That implies a Muslim alliance. Bangladesh started to apply to join.

I'm sure Syria will apply to join, but if Egypt also joins, and there was an invite from Turkey. Now, look at these historical relationships. Turkey, Saudi Arabia, Pakistan, Egypt, you've got Africa, you've got Asia, you've got West Asia, North Africa, you've got the Middle East coming West Asia, you've got the financial might of the sovereign wealth funds, you've got the resources, you've got the manufacturing base, you've got the nuclear capacity, you've got the seasoned army, no one has all the pieces.

And so this is the new regional model and the historical importance of the problems that have been between the Ottomans, the Persians, the Arabs, the Indians, Pakistanis, Bangladesh, all of it is being one by one resolved via these BRICS alternative rails. So to see, Pakistan and India sat down together in the SCO meeting, that is a major, major shift. It doesn't mean you don't have all the historical hate and all those problems, but to be able to coordinate via economic integration and regional dependency to create a collective sovereignty, that's what we're witnessing in the region right now.

And FIC is trying to get as much of that as it can as well and manage the regionalization of America, pump assets, strip it, pump all the value in the stocks, burden the country with that, inflate away the case, inflates into the case shaped economy. And then you're seeing all those currencies and ETF flows go into emerging markets based upon access to resources, which is a trend that we're seeing right now. So the MACA agreement is explicitly being around regional ownership and it has a Muslim feel to it, which is why I think eventually this is when we enter into the next phase of this Iran agreement and we have the resolution with Palestine and Israel, eventually I'd expect to see this is what Iran, the reformist, the government side and the IRGC are leveraging in order to accelerate these types of agreement in a very sequential order.

So we're seeing, again, escalation, de-escalation, bounded escalation, escalate to de-escalate and collective security agreements and joint defense production agreements as well with these manufacturing and China's providing the infrastructure, but the data centers are built upon earning the data. So these are the important parts that we're seeing. Obviously both China and the tick will try and be leveraging those data and so the devil's in the detail.

But if Egypt ends up joining this MACA agreement and you have Egypt plus Saudi plus Turkey plus Pakistan and eventually you then have Syria and then you also have Iran, then effectively you could say that the neo version of the Ottoman Empire is back and that is a major change. That is what the Europeans and the Americans always tried to prevent with these forever wars. You can't have Africa's resources, Middle Eastern energy, China's manufacturing base, Russia's military might and them having collective agreements without boxing America and Europe into just regional powers only.

And this is a new regional security architecture which means global hegemony can no longer be pushed. This is the end of US global dominance, but remember US is not a sovereign country. Fit, commit, ticks and above it and they're global in nature.

So they're engaging in these global negotiations and escalating and accelerating this movement towards multi polarity as well. Egypt's also joining a contract towards a sui security and this emerging Gulf West security architecture. So this is potentially another major piece of the post US dollar dominated.

And so I'll keep watching Egypt again, these were announcements, these were PR, this was posturing at the moment, but we'll watch what happens from Xi's visit, what we've already seen, the Maca agreement and this could be the two states of the same transition, but keep watching how sequentially it's being done. It's stunning to watch, as I said, China provides the capital and the tech, the technology is what we're seeing in the Egypt case where regional powers are increasing their own security and that's a good combination, right? So what happened this week anyway, SEO, we also had a G20 summit. So those are the two sides of the polars, right? And next week we've got a BRICS summit.

So it's all happening all together right now. Very, very important corridor blocks. At some point you have ASIN as well and there's been constant GCC ones.

So these are the key blocks that you're witnessing as well. This really does represent the arrival of this multipolar thesis. I've heard somebody, I don't know who to credit to, I heard it somewhere on X, which I think is a much better in line with my understanding of the world.

Rather than multipolar, I think it's multi-node. So you have nodes in a network, just like Bitcoin, you have nodes in a network and miners that have, they gain access to those resources. I think a multi-node structure might be a much better way of describing what's emerging and you can connect your node to these different regional blocks, GCC, SEO, ASIN, BRICS and so we saw this week the announcements that came from the Shanghai Cooperation Organization.

Now, really important, most important thing that we saw there was India, which most people frame as China and India enemies and of course there's historically that's how it's been and there is competition with the two biggest populations in the world, like half the world's population across India and China. But India through the SEO anyway, and India has always been as neutral as it can be with its leverage and its guard, is increasingly putting out signals that there is cooperation with China, Russia and Iran and obviously a member of BRICS as well. But now using the SEO corridor and we'll see what happens in BRICS as well.

So Modi basically met with the Iranian leadership at the SEO meeting and so was meeting with the different factions of Iran and India once basically announced a deeper cooperation with Iran through the SEO and BRICS. Now, historically, India and Iran have always had that type of relationship just as India and Russia, just as India and China. But we talked about in previous episodes when India gold price, you can go back to a previous episode where I was talking about when India came out and it wanted its people to sell its gold and buy its local currency to defend it.

But the architecture of the Iranian financial structure has always been done via UAE, Hong Kong, India and China and so these BRICS corridors. So Prajeskian, which represents the reformist element of Iran was invited to the BRICS summit in India next week after the announcements that happened at the SEO. And Iran is a member of BRICS plus as well.

So at the same time, we had the beneficiaries of the legacy order G20 which is the 19 largest countries that met and really the main thing that was being talked about was Iran, the Strait of Hormuz, the navigating what's these different relationships and China significantly blocked the consensus. And so there was meant to be a shared statement around the Strait of Hormuz. China didn't block that consensus at the G20 meeting while announcements were happening between India, China, Russia and Iran at the SEO meeting leading into what's gonna be happening at the BRICS meeting next week.

So India basically backed freedom of navigation through the Strait of Hormuz at the G20 summit and India also was basically having discussions with China on the Strait of Hormuz while cooperating with China and Iran at the SEO meetings into BRICS. That's the typical India role, trying to be neutral. This is what you see in UAE.

While people focus on one half of UAE, they forget the other half of UAE. Left OPEC, which is half to the petrodollar. The Enbridge Central Bank Digital Currency which is circumventing SWIFT.

The relationships with Iran in terms of what the latest percent operation targeted Egyptian banks in Iran. Sorry, Egyptian banks in UAE that were facilitating trade for Iran and Iran and UAE, second largest trading partner. So you can see that one half tends to get discussed in Western media, but they're a neutral.

You've got India and you've got UAE and what are they doing? This lies into part two. They're actually, India has been acquiring the strategic assets of Israel, the ports. UAE in Abraham Accords has been investing in the privatization of Israeli companies.

This is the asset stripping and asset sell of Israel into that regional corridor while the alternative rails with Iran are being built which is the normalization with China. When you really follow the money, you can see that what we see and the theatrics is not exactly what's happening and India's playing that role as well. Look, again, this is not me saying I'm a advocate for what's happening here in terms of India's role, what should happen to Palestine, the crimes against humanity.

As I said, I always have to do this and I have to say this in every episode. My analyst hat is following the money and telling you what I believe is happening based upon the monetary flows and ignoring all the media and politicians BS. My humanitarian hat is often not getting what it wants.

What I want to happen is irrelevant to what will happen and so people confuse advocacy for analysis and I have to say it in every episode because I got new viewers that are listening as well. What I'm analyzing is not what I'm advocating for. If I put my humanitarian hat and I go to the advocacy, I do that work as well.

It's a separate part of me as Simon the human versus Simon the analyst. Anyway, and that's the point with India right now. It is countries acting in their own interest, people getting angry at them acting in their own interest because it's not aligned with their ideological beliefs or their human analysis of what they think should happen.

But what we think has happened is not relevant. Unless you are a big allocator of capital, which is why I say you vote with your money, not with your vote, then you don't get a say. And that's why I've always tried to help people understand that the illusion of votes is a distraction from real power.

Anyway, multipolarity, it doesn't mean India chooses between China instead of America. It means it tries to bridge both. And that's why fig targets UAE, India, and tries to do as much privatization in those regions and now privatizing Israel as well into this new multipolarity.

So India is increasingly refusing to choose and America in the public facing BS Trump rhetoric, there was a trade war and the farmers in America and the different soybean and so all that type of stuff. But this is trying to get as much leverage for these fig trades into multipolarity as well. But anyway, India and Russia, that's why the pressure campaign, you had to get the relief of sanctions.

And so Russia is now selling its oil not at the discounted rate because it's got sanction relief as a result of the price of oil going up. So India has to pay full prices now. So you can see these different posturing that's happening.

And then you started to see progress in India and Iran and India and China as well resolving historical issues. And while India is managing its relationship with the US and is almighty remittance industry where it's exporting its labor across the world and they're sending back those, they're earning in dollars in pounds in euros, in Gulf countries pegged to dollars, in dinars and in various other things. And then millions is flowing back in order to through the remittance markets into the Indian economy while they build out their technological industrial complex and some of their own independent military industrial complex.

And then that gets into the historical challenges with Pakistan. But at the SCO meeting, you had India, you had Pakistan, you had China, you had Russia. So this is real politics or this is regional integration knowing that the world is changing.

So anyway, multiple nodes negotiating with each other, I think is right. I think I'm gonna change this from multipolar to multi-node world order. I think it's more reflective of how it is.

I don't know who I stole that from. Maybe you could research and put in the comments who was the first to coin that phrase, but I heard it on X through somebody anyway. So what's next? Brick Summit 12th to 13th of September.

That's gonna be in New Delhi. And so Iran will be there and we'll see what happens as well. So what I'll be watching for is I'll be watching Iran, India, China, Russia discussions, what they announced.

I expect more continuations of what we've already seen and I'll be watching the straight up for moose. Whenever we get to the next phase, however long it takes, as I said, I believe the order's changing. All the financial markets are telling me that and eventually we'll see.

I got the timing completely wrong, as I said in part two. I thought this would have been done by now, but hey, you know what? You ever been involved in a business deal? Every single deal I'd been involved with in my life takes longer than I thought it would actually take. And that is a human condition, I think.

We think we radically underestimate what we can achieve in 10 years and overestimate what we can do in one year, right? Do you relate to that? But things take time. And every deal I've ever been involved in, M&A, companies go in public, any type of transaction, any type of big deal, it's always taken longer than previously imagined. Can you imagine how much it needs to be negotiated in changing the world order? So I'll forgive myself for getting the timing wrong, but directionally, this is where I think we're headed.

So I'll keep watching the security arrangements and cover it each week. Sanctions, you know, temporary relief, full relief. The sanction money from when the Shah was spending in the MiC and then we had the Iranian revolution and a lot of those funds were confiscated.

The release of those funds has billions of dollars. And most importantly, watch the payment rails. These are so important.

The settlement rails, the payment rails, it doesn't matter whether you're pricing things in dollars, it's what you're settling, what the alternatives are and what infrastructure is being built, both on the Chinese side and the fixed side. This isn't the East replacing the West. It's the end of one hegemony node and the rise of many other nodes as well.

So speaking of which, now let's look at the Western hemisphere. I've always said that the MiC will exit the forever war until it has a new war zone. And I identified three possibilities.

One is central and South America. The other is continuing escalation with Russia into Europe. And the third is domestic terrorism and the police and surveillance state across Europe, UK, America, the Western hemisphere, Canada, Australia, and looking at those allegiances.

So a deal was signed with Venezuela. We had one of those covert operations. Trump, the narrative was that this is about drugs, but it was about oil, obviously, and it was about separating the world based upon China, Russia, and Iran's penetration of Venezuela and agreements, in my opinion, massive coordination where they were trading settlement in Syria, settlement in Ukraine, settlement in Taiwan, settlement in Venezuela as an alternative to World War III because everyone was dependent upon China's manufacturing base and Russia's resources as well.

Okay, let's discuss Venezuela. We've covered Venezuela many times leading up to the different operations and historically. Let's jump straight in.

And we had some announcements from Trump and the deal. Let's look at what the deal was, what's real, what's not real, what it means for this transition. So by way of background, Venezuela is incredibly important because in a Western hemisphere with America dominating its local region, the question of central and South America, Europe, Canada, and those regions become incredibly important.

So historically, if you look at what was happening with Venezuela, it was receiving drones produced in Iran. It was a military rare earth type of relationship with Russia and an energy relationship with China as America was losing its dominance across the region. Now, this operation was, I believe, coincided with the settlement of Syria, a covert fake operation in Venezuela saying it was about drugs and drug trafficking.

Really, it was regime change based upon compliance with mikfic, China, Russia, and various factions of Iran and their agreements in the region. And so while we had the settlement of Syria, which involved both Russian interests, Chinese interests, and Iranian interests, and then we had the gold funded revolution funded by Turkey and the GCC, and then we had the expansion of territory by Israel, we also had the Venezuelan operation. So you'd see how these things work.

You get a fake narrative, you realize this for mikfic and tic, is told to the voters of this for the American people and the lowest IQ voter kind of buys into that narrative. Now, Venezuela, I expect to be, it was already financially oppressed through currency wars from fic, then we had Trump escalating the military regime change through mik. Now I expect tic to take over in the region through stable coin adoption and the historical role of the forever war in the Middle East where you use war zones and territories in Central and South America in order to dollarize them, like happened in El Salvador, then you put it on digital rails and you have tic control grids providing much of the technology and infrastructure.

That was the sequence that we saw in El Salvador, and then we had the building up of a Bitcoin strategic reserves as a sovereign strategy for a resistance against IMF, but IMF ultimately uses leverage, but the Bitcoin strategic reserve strategies still exist there. Now in Venezuela, there was the confiscation of the crypto, which hasn't entered the Bitcoin strategic reserves of America yet. We don't know what's happening with the gold and we don't know what happened with the stable coins, but apparently those were confiscated and then we'll find out what actually happened to them.

So you've got what's happening, the announcement was all around what's happening with the oil. Now Venezuela, I expect to become similar to the Palestinian laboratory across different regions of Central and South America, because I believe that that's the negotiated settled outcome for the police and surveillance state that's being built across the tick dominated and thick dominated West. And so I think makes up for lost profits in Central and South America, as well as through escalating with Russia across Europe to increase the revenue that is lost from the Middle East and forever war, as well as the police and surveillance state, prison, privatized prison sector, domestic terrorism, immigration policy, open borders, closed borders, algorithmically radicalizing the rise of militia groups, that all leads to the technocratic control grid across America.

So an important part of that is what's Trump's narrative that's being fed to the people leading into the midterm election and is Trump still useful to power? Because remember, power in the world of democracies or fake democracies is that you need to be useful to your lobby, Mikfic tick, the most important ones, but you need to pretend that you're useful to the people. So if you still have a cult following, then you're useful in terms of the narrative side. And if you're still providing all of what powers needed.

So Trump does very well in terms of providing fic what it needs. He's been awesome for fic through all policies and tick as well. Now, less useful to Mikk, even though we've seen war escalation, but as part of this managed transition that we've talked about, very useful to his private interests, goal-funded affinity, capital partners, UAE stable coins, various other things.

So his private wealth into regional stability in the Middle East. But he's losing on his cult following and narrative. He's still got a bit of a cult following, but it's shrinking.

And so midterm elections is where you demonstrate to real power whether you still have the ability to service Mikfic and tick and pretend as a distraction that you work for the American people. So his job is now to ratchet up the narratives. So he's been handing over to JD Vance in terms of the settlement, a tick note.

JD Vance came from the Palantir, Peter Till funding. Trump came from Elon Musk, tick funding, Peter Till, those types of crews as well. But he also had Bank of New York Mellon, Mellon Bank and Dynasty funding.

And he also had Mary Madelson Israel, which is Mik funding. But he also had the Gulf funding for regional stability in the region. So if you look across his money, he's trying to balance those different servicing.

But that's causing a lot of tension with his voter base because he promised America first and obviously has Mikfic and Mik, particularly fic, tick first. Fic and tick first, Mik kind of last and Gulf in between because that's a fic mission with the Gulf sovereign wealth funds. And so that's what's managing this transition and the voter base are getting increasingly pissed off that there's no America first.

So he needs to lean into the midterms. And so you start to get a transition to JD Vance being, oh, I'm gonna be responsible for the Iran agreement. But Sen has been pushing the economic side without Trump having to do it.

And then Trump is now gonna have to lean into, oh, shit, I gotta pretend I'm serving Americans again. So expect an octave in BS narratives. One of those is Venezuela.

Trump framed this as the biggest oil deal in world history. Well, there have been many oil deals done and this is probably 10% of what's being reported, but we're used to that now. So anyway, leading into midterm elections, we have a diesel fuel crisis.

We have an aviation crisis. There is shortages in diesel. And of course, oil companies will always favor higher prices over anything that is needed for domestic needs.

And so people will frame that as different things. Like some people will say, oh, they're sending their oil over. No, this is a company that is selling their oil at the highest price.

And when you export it, you may be able to make money from exporting it. Then you can for domestic needs. And so people keep confusing the needs of the country with the fact that it's not a sovereign country.

It is companies that are maximizing for their shareholders that decide. That's the construct here. MiG-FICTIC is a bunch of companies that all require FIC capital and they have to maximize the revenue.

It's not the national debt is only of concern to the FIC in that they receive their yield and they get their money back. It's not paying down the debt. They need to roll over the debt because national debt is a subordination vehicle for bondholders.

But anyway, same with big oil. Big oil wants to sell oil. So as the prices are higher, they do better.

It doesn't matter what the price is for the average American. It doesn't matter as long as you're still able to continue business as usual. And that's what is being negotiated as we've been covering throughout this whole war cycle.

And so the claim is that the US as an entity regains majority control over 65 billion barrels. Well, firstly, the 65 billion claim is complete BS because there is oil that there is a potential to achieve in decades ahead. If you spend significant money extracting it, then there is the type of oil that it is.

It doesn't start immediately impacting the price and filling the strategic reserves and who makes money from extracting it and what is the price of the oil as you do that. So US will purchase oil for its strategic petroleum reserves, but it won't be Venezuelan oil. It will be companies that get that contract while the national debt is the bill for everybody else through the hidden tax of inflation.

And so it's all around what private corporate interest gets the contracts and who ends up buying. Well, America gets to buy it. It doesn't get it for free is not how I think the transaction happens.

And it requires an investment from whoever's gonna control it. And so whoever ends up investing will get the beneficiary from it and the shareholdings from it. And there's a private organization that's set up in the middle and the organization had significant change in shareholders prior to the Venezuelan action and the deal being announced.

Plus the 65 billion barrels is just the total amount that could be available under the ground. But what it makes it sound like is like America has just doubled its oil reserves. No, it has to purchase it.

The oil reserves are not the right type of oil and it requires significant investment until the maximum potential as 65 billion barrels can actually be done which is not the biggest deal in time. It's been done many types of deals. So we're used to this anyway.

But the idea is that the bill is socialized onto the people through inflation by the Pentagon budget which boosts the share price of the military that conducts these actions. Then the military gets access to the resources and regime change that has geopolitical significance. And then you get the resources that is not for the American people because there's no sovereign wealth fund in America that has access to these resources.

That is purchased using the debt. And so the FIC get the interest and yield on the debt. Everybody else gets socialized losses through the bond market.

The equity valuations increase depending on who gets the contract. And that increases the value of the dollar which makes exports more expensive. And so it's only in weakening the currency and giving up world reserve currency that that transition between fiscal dominance is here.

So this is the asset stripping phase of an end of empire where you're using and renting the US military as a militia in order to acquire those resources for private global interest, as I've always said. So America does not suddenly own another 65 billion barrels of oil. However, to leading into midterm elections to the lowest IQ person that just reads Trump's true social posts, that sounds like a political win.

So expect more and more of that. Doesn't matter whether it's true, doesn't matter whether it's reality, it's just the game of hiding true power and leading into the midterm elections, what happens? You need to demonstrate to real power, Mick, Fick and Tick, the lobbies, the most important lobbies that you're still serving their interests but you still have a following. And as long as the American people still believe Trump works for them, then he's useful while he's still serving Mick, Fick and Tick and lobby power.

And Trump is doing very well at serving Fick lobby power and Tick lobby power. And profiting from it personally, managing the transition that Fick wants, which is into multi polarity, providing the narrative for Mick lost profits from ending the Middle East and forever war and having the Central and South America and European war zones, as well as domestic terrorism and civil unrest domestically to monetize. But he's getting quite unpopular into a certain degree of his voter base.

The ones that are making bank that own the shares are loving it because their stock market valuations are all time high. The ones that don't own the assets, which is an ever increasing number of people having the worst time ever. And so that then leads to the tension.

Then you have the midterm elections and you have to demonstrate to real power that you still have the cold following that distracts people from knowing how the world actually works or how the system actually works. But more and more people are starting to discover it because of this information age that we're in. And so they're profiteering from algorithms and tick control groups.

So anyway, oil in place, which is the $65 billion is not the same as recoverable oil. Recoverable oil from the oil experts that I've spoken to, like Anis, he was saying estimating about 10 to 15%. So recoverable oil is not economically productive oil too.

It's not producible oil that you can actually go out and get out of the ground because that requires significant investment. So Venezuelan oil is not US proven reserves because it doesn't belong to US, it needs to be purchased and it needs the significant investment and those contracts are divvied up and there's not 65 billion barrels. So you can see through the BS there but whoever gets the rebuild contracts and the refinement contracts and ends up purchasing that oil will tell us a lot.

So we'll keep following that as we do. But remember, heavy Venezuelan crude is not oil that you can simply put into a strategic petroleum reserve. And the strategic petroleum reserve have been drained so that oil companies can get more contracts, sell at higher prices and it can cost the strategic petroleum reserves higher prices in order to purchase that which then rolls over the debt, helps the FIC yield and pumps the markets that benefit from that.

So meanwhile, the actual US strategic petroleum reserve as I said, is down to 287 million barrels which is not a surprise for those people that have been following because relief of sanctions from Iran and Russia, the draining of Japan's strategic petroleum reserves, the deals that were being negotiated as a result of the closure of the Strait of Hormuz and US strategic petroleum reserves were what keeping the price down while announcements were being used as insider information to profiteer personally from those in the inner circles including the Trump administration. So the strategic petroleum reserves are at four decade lows and they need to be purchased at higher prices in order to fill those again. So that's how you know that there is bounded escalation and this is a managed transition because the strategic petroleum reserves are not the consideration of FIC, they don't care.

Other than selling them. Now, if you can sell to exporters more expensively then you prioritize that revenue as your fiduciary duty to your shareholders. Anyway, so what did America actually gain as a nation state? Well, it gains certainly influence over Venezuelan oil but that is for the lobbies as well.

So it can direct that into pumping up the K-shaped economy. It also has a degree of veto over the investment in the infrastructure as opposed to China but China would have asked for things in because it was exiting prior to the covert operation that led to the regime change at Maduro it would have asked for things in return which is Syria and Taiwan and the different types of negotiations that happen there as well as Russia which would have been the resolution of what's gonna happen in the Russia-Ukraine situation which I think will be an extended war that will lead to divvying up those different routes and China's now purchasing more oil than Russia than ever before while we're in this transitionary phase right now. And that's because there was sanction relief.

So India is now paying the higher price rather than the discounted price. Iran and Russia got their temporary sanction relief but now we're entering into the economic operation in Iran which Russia then benefits from in terms of purchases from China. And they get to use some of these negotiations for FIC not for the American economy.

So if you own the shares then you may benefit from it but also whether what happens with the frozen assets and gold and there was some confiscated Bitcoin, there was gold reserves, there was stable coins we'll find out what's happening with those and we don't fully know right now. I haven't seen those added to the Bitcoin strategic reserve which is only filling its reserves through confiscation which has been the Trump strategy, confiscation of Bitcoin rather than purchase of Bitcoin in relation to the strategic reserves which is where stable coins and that whole control grid comes in. So I do believe that Venezuela will be part of the beta test of TIC technology for the global control grid and it will most likely be dollarized through stable coins similar to what happened in El Salvador.

And Venezuela this time had maybe their Bitcoin confiscated or their gold confiscated which would be the resistance for the Venezuelan state sovereign interest. So whether that is now, but where is that gold? Well, that gold is reportedly being transferred to US but that never all got confirmed. So it was in the Bank of England and so the Bank of England has that leverage in these FIC level negotiations as well.

So, plus there was rumors this week about Venezuela leaving OPEC. Now, I don't think they will because I think they need the quota because the numbers are smaller in Venezuela than meets the eye. And so I don't think they will leave OPEC but I think this is posturing into negotiations.

So I don't expect this to be like UAE where they've already got their own quotas and a degree of sovereignty from the sovereign wealth fund. Venezuela is fully vassalized at this stage and in America's sphere of influence which means they become a TIC, FIC and MIC node. Make up for lost profits in the MIC, control grid by the TIC and financialization of stable coins and securitization into this programmable money, programmable tokens.

So I don't expect them to leave OPEC which is the other half of the petrodollar. The most important part of the petrodollar to watch is the peg of the Gulf countries currencies which still remains. And so yeah, I won't expect that to happen but if they do happen, if they do leave OPEC then that would be significant.

But Venezuela is still trying to recover from basically the 31 tons of gold that is now at the Bank of England. And so what's gonna happen to that? Well, that's leveraging this negotiation as well at the same time as the UK and Europe selling down bonds. At the same time as Japan selling down some of their bonds at the same time as China selling down some of their bonds.

So you've got them trying to balance this stable coin adoption in Central South America while Europe is moving over to CBDCs which is non-swift related settlement as well depending on how that technology works as well. So anyway, there's been no evidence yet that the gold has been transferred from London or the Bank of England over to the Federal Reserve or Fort Knox. That hasn't been established.

There have been rumors about that. But I'll definitely be watching what happens to that gold. And I still wanna know what happens to the Bitcoin.

Does it enter the Bitcoin Strategic Reserve? Has it gone into some type of corruption? What happened to the stable coins? So I'll be watching what happens with OPEC, with gold, with the Bitcoin and the control grid stable coins as well. So we need to see how Venezuelan oil is settled as well. I think it's gonna be dollarized.

I think that's the sphere of influence. And I think that's what world leaders in Iran, Iran I think would have settled around the no longer supporting the proxies. I know that's an offensive word for some.

Resistance, whatever you wanna call it. Genuine resistance, sometimes weaponized as proxies. But I don't wanna weaponize that as a word.

I'm just trying to be accurate in terms of the description of how they are utilized. And so if you are integrating those into a political process and a military process in each of the regions, then Iran's exit from Venezuela would have been part of that. I think with Russia, it would have been an agreement to continue the war for longer so that Europe can be vacillized deeper into the US stock market and sphere of influence can be determined for Russia.

And on the Chinese side, obviously, the mikvik and tik need access to their resources, cheap labor and their refinement and everything. And China wants Taiwan. So I think that's all been divvied up and settled.

And we're just in the strategic coordination at the highest level of powers into these transitions. And as part of that, dollarization of Venezuela would be what I'd expect to happen. So the Western hemisphere, I believe is being, this is part of a consolidation strategy.

The US doesn't need to own Venezuela in terms of a physicality. All it needs is basically Venezuela inside the node. And the best way to achieve that is through the thick node, the mik node and the tik nodes.

And so mik is basically changing the political alignment. That was the regime change operation with Maduro. FIC is negotiating oil, capital, sanctions, and then access to probably the dollar stablecoin rails.

And tik provides the digital control grid and the digital rails in order to continue the tasks that the mik used to do through covert operations in the Middle East. But now they can do it in Central and South America again. And they get to test their technology and they can do it across Europe and then the domestic crime technologies as well.

So if Venezuela leaves OPEC, which I don't expect them to do, but oil stays on the dollar stablecoin rails, then this kind of supports the thesis. I expect it to stay and I expect it to dollarize further. If Venezuela moves oil settlement away from dollar architecture, then the analysis is wrong.

And in fact, the American dominated FIC mik tik is going more aggressive on America into a multipolarity. But I think it was negotiating having the Western hemisphere under its digital control rails. But that's what Venezuela is really about.

It's definitely not about drugs. And as I said, CIA, MI6, Mossad, they support the drug trafficking routes in order to fund their black op operations. So what else can we look at? What's happening? So that's on the Venezuelan side and we'll keep following Europe, Central, South America, Canada, Mexico and these different regions to see more and more of that.

But what's happening in terms of the mik and fic across the Middle East? I talked about different changes that we're seeing. We covered Iraq earlier and we're seeing same thing happening in Syria, but a different flavor. So in Syria, Iraq, Iran, let's put that in one block.

We've got three different models that are being progressed as the mik exit and the fic gets what it negotiated. So in Syria, they removed the classification on Syria as a state-sponsored terrorism designation has been removed. Let me re-translate that.

Basically, Assad that was supporting the corridor between Iran and Hezbollah in terms of the resistance after the Israeli invasion of Lebanon, that corridor has been closed since the removal of Assad and that required the cooperation of Russia, Iran and China when the GCC, Saudi and Turkey funded the revolution and Assad stepped aside and got asylum within Russia. Now, once that node goes, the strategic tension between Israel and Iran is weakened. So the justification for Israel as a mik node and also the reformation of Iran into regional integration normalized via China, that is accelerated which also means that in order for mik to leave, fic would have had to have been compensated.

So how did fic get its relief? Well, it stops mik, stop sponsoring ISIS and Al-Qaeda and you get a rebrand of Al-Qaeda members into presidents and they represent the Gulf and Turkey interests into regional stability and America steps aside and America in order for mik to enter, fic needs access to payment rails. And so what did you get? You got World Bank loans announced and you got the removal of state sponsored terrorists proxy removed from the Assad leadership. What that means is that America stopped funding terrorism and now the fic have negotiated that they got their deals.

Remember when the Syrian president went to visit Trump and they sprayed him with perfume and then immediately Trump met Citibank and all the banks and BlackRock and Larry fic it means they got their front run deals. Syria's going to regional integration. The classification has been removed which bumps the inside of trading that was happening.

Then you get access to visa rails in order to keep it into the swift system while it integrates and builds out eventually if it gets a sovereign wealth fund into the alternative rails that the Gulf corridors have built integrated into China. So that's the transition that I think we're witnessing right now. And obviously Israel has held on to some mik leverage power by taking over Gollum Heights and getting access to additional territory and trying to destabilize the region so that mik can maximize profits before fic gets their financial rails.

And so this is a financial reintegration or a financial integration which would have been the settlement for fic to allow mik to leave. And so it's integrated into swift payments, investment rails but with a Gulf flavor. So Gulf is providing the capital fic's providing the payment rails and then suddenly US takes off the state, they get the sanction relief and they take off the state sponsored terrorism because America stops sponsoring the terrorism via Israel and the mik proxies as well.

Now, what did we get Iraq? Iraq's a slightly different model. We covered it slightly deeper. So we're getting US troops are now leaving Iraq which was guarding the oil fields but they installed fic federal reserve rails where their reserves are held at the federal reserve within the swift banking clearing system.

And so they're holding onto those rails but there was an announcement. Firstly, they were gonna be re-denominating the Iraqi currency and adding three zeros which is just central banks exerting monetary policy it doesn't increase the wealth it's just re-denominating the currency but it came with banking reform announcements into digital rails. Now, what are those digital rails? If they're CBDCs, then that's an alternative to Swiss.

Sorry, to Swiss, to the swift system. If it is dollarization through stable coins which I don't expect, then this is fic getting its leverage negotiation in terms of the oil settlement with Iran cooperation as part of the agreement for Iran to get the sanction relief into these negotiations. So what happens with the financial system in Iraq is an indication what Iran will do next as what happened in Syria was in the, excuse me, as what happened in Syria was an indication around Gulf regional stability, Turkey, Mecca agreement and China normalization.

So these are two different models based upon Iran agreeing I believe with Russia and China to allow Assad to be regime changed, Gulf installing their leadership and then now we're getting the exit of US from Iraq while Iran agrees to stop supporting militia groups there. Similar things happening in Yemen, similar things happening across other parts of the region as well. So anyway, they announced that they're gonna be doing digital payments, but we haven't got the details.

Is this a swift circumvention rail? Is it a fic integrated swift rail? And how does that impact what happens with the oil? Now the Kurds that were there guarding the oil for American fit control and big oil. Now they were redeployed and they were meant to be involved in the Iran operation, but that never moved forward because there would have been some kind of agreement and settlement most likely, or it was understood that it would be a suicide mission for Mik anyway. So financial integration into Iraq is really important one to watch.

And of course, the big one, which is Iran. We are seeing additional military pressure happen this week. We saw the secondary sanctions that have been applied and I do believe genuinely that they are weakening the currency further creating more inflation and starting to squeeze on some of the UAE Egyptian banking rails that allow for the flow, but that just draws Iran deeper into China and the kind of assilization via the Petro Yuan.

And so by being a member of OPEC and by leaning into China, which is why they were at the SCO meeting and will be at the BRICS meeting, it's kind of pushing Iran deeper into the sphere of influence of China, while the 300 billion, the sanction relief and what comes from an agreement there, which will eventually, I believe, leave to the Mecca agreement where Iran joins the security back. And what happened this week in retaliation? Well, there was a threat from Scott Besant on the banks that were facilitating the Iranian trade. We've already had confiscation of the stable coins, but the Bitcoin remained.

So I think Iran is continuing to mine Bitcoin into his nuclear energy program. Besant is threatening sanctions against any major bank or financial institution that is facilitating trade. So that's FIC leverage for MIC exit and TIC negotiating its contracts with the Gulf countries.

So the real test here is China. Are they being pushed further into China? And China basically is remaining the critical buyer of the oil and at these higher prices, it started to suppress some of the oil during the war, but this basically has turned Iran fully dependent upon those rails, which go via UAE and Hong Kong as well. And so the Hong Kong rails, why the gold trade oil trade that goes into the Petra Yuan and integration into the SIP system.

Now here's the key thing. Scott Besant sanctioned one of the Egyptian banks located in UAE, but it didn't sanction the Chinese banks. And what does Scott Besant say? He said, I don't want to destroy and blow up the financial system.

He probably wasn't meant to say that part. That's him admitting that sanctioning the Chinese banks blows up the system, which blows up the bond markets, which pushes out the yields, which sends US into the doom loop. And then FIC, MIC and TIC can manage that transition.

So what happens with the Iranian oil is very, very important. And so at the same time, all of the different rails are being built to create less dependency upon the Strait of Hormuz while we had the different announcements from both Oman and Iran in terms of the toll. So US, they can sanction the tankers and the middlemen, but eventually Washington has no choice, but to enter into a deal at some point.

And so we had some of the Saudi oil tankers being targeted, but nothing that led to complete destruction of the tankers where it was an oil disaster into the sea and various other things you might expect in a real war. And by real war, I mean, one that's not operating within the bounded escalation negotiations. So the real question that we answer next and that we'll keep following on Simon Dixon Hall talk is how far is America prepared to sanction Chinese financial institutions? That's the real game.

Because if they do that, then that is way more of an escalation. And I expect that not to be triggered in a bounded escalation model. So China said it's gonna protect its interests and it invites, you know, it hosted Iran at the SCO meeting next week and India will be hosting Iran at the BRICS meeting next week.

So the military battlefield, I think in the Middle East is changing to a financial battlefield. That's the phase that we're at, which involves the sanction relief, the toll passes on strategic groups and the rebuild contracts. Those are the key things that we keep watching.

But the might footprint is shrinking and the footprint is still gaining access through some of those dollar rails. But the pressure is moving towards bounded escalation and resolution on both the Iranian side, the Chinese side, the Gulf and others that are gonna be towards these different types of either alternative rails, CBDCs, or, you know, the SWF rails as well. So the FIC, you know, sanctions can only protect the dollar system.

It can't protect the non-dollar system. And the incentives, you know, the more you push there, the more we move to multipolarity and alternative financial rails, which obviously in a multipolar world, the FIC is trying to get a transaction fee from settlement between all these alternative rails as well. That's basically how the multipolar, now I call multi-node financial architecture is being built through this bounded escalation.

So what do we see in all of that? Well, we saw another boost in the price of gold and another price in the price of Bitcoin. So, you know, those times are changing. There was a very interesting announcement that came from Netherlands.

Now we watch Netherlands because what's been going on in Netherlands, in previous episodes, we talked about how tax reform is strategically weakening the key assets and private equity is sweeping in based upon wealth tax and exit tax, similar things that are happening in the UK or the direction it's headed. But Netherlands has a key node for the TIC because it has ASML, one of the key components of the semiconductor AI robotics trade. You know, the key nodes are Japan, South Korea, Netherlands, Taiwan, and then the purchases are China and America that are building their independence from those nodes and infrastructures.

But Netherlands is really interesting because it also decided to take this opportunity to take control through a covert operation unannounced, 86 tons of its gold reserves away from North America and over towards London. And my answer was wise move. Taking your gold away from custody in America, while they're trying to simultaneously, you know, the FIC is trying to simultaneously gain access to these private equity assets through sponsoring policies of wealth tax and exit taxes.

That's a great move because your sovereign assets is how you build power. But what do we know from Venezuela and what do we know from Argentina? Argentina also moved its gold over to Rothschild Bank in London. Why is that happening? Well, a lot of the gold seems to be moving over towards London and the state of London seems to be negotiating into these China rails as well.

And so more of the gold is ending up in Singapore and Shanghai. And yeah, more of it's going over to Switzerland. But why is these transfers happening over to London? If Netherlands was a sovereign country, they would take self-custody of their gold.

Every country should take self-custody of their gold. You know, they should build the infrastructure in order to protect their gold in self-custody. So they can use it if they were a sovereign state to build a sovereign wealth fund, which would allow them to negotiate away from Mick, Vic and Tick in trying to remain a sovereign country.

But because it's fully vassalized, the Dutch empire, the British empire, the American empire, the previous world orders for the last 500 years, you're starting to see them move over to London while what are they doing with that? They're using it as collateral in order to issue more leveraged gold contracts. And so paper gold is increasing just like we're seeing with Bitcoin. Strategy and micro strategy and BlackRock and various other nodes are centralizing as much Bitcoin and then issuing paper contracts against it.

In fact, even Trump mentioned that he's trying to bring hyperledger into America and set up a regulatory regime for many of these different highly leveraged products within the Bitcoin and crypto sphere. So that helps the digital control grid through crypto. It helps centralize as much Bitcoin so you can issue more paper Bitcoin.

Meanwhile, who's got the real Bitcoin? Well, Iran's mining it, UAE is mining it, Russia's mining it, and China's banning it, but 20% of the mining is happening within China still while it's publicly facing banning it and it's building its massive gold reserves. So gold is going eastwards, Bitcoin is going central, and America's confiscating more of it, but the Department of Justice is transferring some of that Bitcoin back. For example, Bitfinex.

Bitfinex is meant to be received the settlement while it integrated its stablecoin, USDT, into the Genius Act compliant grid control rails while setting up in El Salvador, which is the tick node while the IMF is trying to leverage to make sure that El Salvador is more dollarized rather than having its Bitcoin strategic reserve. So you can see this power play that's happening around the sovereign assets, but Shanghai is ending up with more gold and more and more nodes like Netherlands are transferring them over to London where they issue more paper contracts, and then with those paper contracts, it's a central bank lending that leads to the transfer of gold for the physical settlements by the Hong Kong rails, the Shanghai rails, the Singapore rails, and obviously via Switzerland through the Bank for International Settlement Rails. This is the asset stripping of that gold.

So away from America goods, but over to London, bad in terms of Netherlands, but that just shows the Bitfinex subordination that that's no longer a sovereign country, which you'd expect after inventing the central banking model from Amsterdam as well as the Dutch East India Company and the socialization and privatization model that was expected exported to UK and then exported to America. So the official reasoning that was announced by the Dutch government was that geopolitical unrest within America and the need for liquidity and diversification of custodians over to London. But if that were real, then you would self custody the gold in your own country because the story of Venezuela and the story of Argentina is that your gold held in somebody else's custody is not your gold.

And that was the story of the American people when the gold was confiscated between World War I and World War II during the last Great Depression. And that law has been repurposed for Bitcoin confiscation, but via the Department of Justice rails. So the Mikin is being used in order to confiscate Bitcoin, put it in the Bitcoin strategic reserve and then distribute it via FIC nodes at the moment and building the tick control grid of stablecoins and programmable money while Europe moves deeper into the central bank digital currencies.

So Venezuela is still fighting for their gold in London while Netherlands transfers its gold to London. Central banks are increasingly really thinking about where the gold sits, who controls it and whether it can be monetized, financialized, securitized and even whether it can be mobilized, whether it can be frozen, whether it can't be frozen. It isn't enough to own an asset right now in paper.

Who holds it is the key. And when we're in this transition, this further and further into this transition, those that have the highest gold in their own control relative to their GDP and debt and the least number of paper contracts held against it is the one that gets a seat at the table. Just like those that hold their Bitcoin in self custody get a seat in the sovereign table to resist against the digital tick control grids and the centralizing forces here that are being happening.

So anyway, in summary, let's close this up for now before the internet crashes again. Don't watch the individual missiles buy into the narrative, the state propaganda from all sides, watch the architecture that's being built and how it's being built and follow the money. We'll keep doing that at Simon Dixon hard talk.

And of course, subscribe here, hit the subscribe button, hit the notifications and you'll be notified. We are severely, many people that are subscribed to me are saying that they don't receive those notifications. So like, comment, do what we can to support the algorithm.

Let me know what you'd like to see in future episodes but don't necessarily watch OPEC alone. Watch exactly what happens to the Venezuelan oil, the Venezuelan gold, and also the sanction relief that we'll see as well as the different financial settlement rails. That tells you the complete story.

Don't just watch BRICS next week as an anti-America. You got to watch it in terms of regional nodes, FIC leverage, MIC leverage, tick leverage, and what can possibly be happening into FIC wanting multi polarity and tick wanting digital control grids as well. Don't just interpret every Iran escalation as something that's taking us to World War III or anything like that.

Think of it in terms of the regional rails and what comes next. Longer term thinking is how you get ahead of this. They want you just reacting to the headlines.

And reacting to the headlines is the content that they're rewarding. The content that actually thinks long-term and is rational and gives you a longer term vision to protect yourself from, that's the content they don't want you having. So that's what you should be doing.

So watch what gets negotiated after all of these escalations. Strait of Hormuz is the most important event to this transition that we'll ever see. The new security architectures that have been set up, the Mecca Agreement radically changes the world as we know it.

Sanctions are becoming less powerful as the alternative rails are being built, but they still provide negotiation power in these transition. Any US military withdrawal really tells you this isn't about wanting peace. This is about not being able to exert influence in exchange for FIC power.

Regional security agreements, reconstruction agreements. I'm looking forward to all the details. We'll keep covering the different payment rails.

What they integrate into. And also what happens to Palestine? What happens to Palestine sets the shape for everything that comes next in the other war zones? What level of sovereign wealth fund it might be allowed to have? Who makes the investment in the rebuild contracts? All of that determines what happens to Israel, which will only be resolved once the Iranian situation has been settled and understood. And then we enter into a major, major change.

A shift of, you know, we'll never see. So the next major checkpoints that we need to check in and Simon Dixon, Hard Door Live. We got the BRICS summit next week.

That's on, sorry, 12th and 13th of September. That's coming up then. So probably a couple of episodes so we'll be able to cover that.

The old order was the American military dominance plus the dollar financial dominance. The emerging order is effectively regional security nodes connected by competing financial settlement rails and technological rails based upon who hosts the data centers. That transition is not for America, is for Mick Fick and Tipp.

And Trump is the conduit that gives a public facing narrative in order to make people think something else is happening. So that's everything I've got for you this week. The episode we called it, you think you're watching a war, you're actually watching a new world being built.

And I hope this delivered upon that promise based upon everything that happened this week. In part one, I covered India, I covered China, I covered Iran and how they sent a major signal via the SCO meeting and that the BRICS meeting is next. Now we're gonna head over to part two.

In part two, I was invited onto a podcast and the question was very much focused on Israel and where we are in the war, but it was me sharing further details on how Israel is being privatized and how watching Netanyahu working in his own individual capacity because whatever replaces Netanyahu will be radically different. And I don't mean from the Zionist war mongering anti-Palestinian rhetoric has to ratchet up into this election cycle that's happening in October, but I believe the Iranian side needs to be settled. Then we get the settlement of happening with

Netanyahu into October.

We'll keep covering. I'm expecting regime change. He may have more work to do for Mick, Vic and Tic.

We'll see for that. But how Netanyahu I think is being left behind we'll be covering that. And that was me appearing yesterday on Wally Rashid's podcast.

So I'm gonna ask you for a few things and then we'll go over straight over to part two where we'll play that interview. First thing is please do, if you're watching us on YouTube, like, share, add a comment below. I read the comments in determining what bits I'm not explaining clearly, what could be explained more clearer.

This is where I give all the details. This is more for me every week making sure I'm keeping up to date with everything. So it joins into my analysis.

I've now completed the complete first draft of Game of Money, my new book. And I'm now going through the edit phase. So we're going through the different edits.

We're drawing out all the diagrams. I'm really, really happy with the book. It's broken into three parts.

Part one is on understanding the Game of Money. Part two is on mastering the rules broken down by each market. And the third part is on winning the Game of Money.

It's about 280,000 words. So it's a big book. It may have to be broken into a couple of volumes, but I've literally filled in all the gaps to empower you to have a plan for yourself in order to build your sovereign longer-term strategy and move from the subordinate to sovereign.

Classify where you are in each area of your life. And really, it's been my lifetime work answering the question for my father who asked me when he lost all his money, what happened to his money. It took me 25 years.

Sadly, he passed away before I was able to give him the answer. So I'm giving the answer to you. And we'll be looking at how we can deliver that book in combination with you having all the tools you need to deliver your plan.

So I'm really looking forward to that. I've even started on the next one where I'm applying the methodology to different markets. And the next one's gonna be on applying it to the history of Bitcoin.

I really wanna document the whole history of Bitcoin because I was there from 2011, like two years in. And I think so many people get the history wrong. And so I really wanna apply the methodology and explain what's happening to Bitcoin now as a separate book.

So if you are interested in getting notifications and joining the open source community, you can join at simondixon.com. And there's a free membership. I don't charge for anything. There's no sponsorship.

There's no adverts. There's no monetization. There's no upsell business model.

The only thing I've got is I'm gonna be releasing my book and I'll probably be figuring out a way to do that in an open source way. And anyone wants to buy the audio book or something, it makes no difference to me, trust me. But that's the only thing we got at the moment.

But if you'd like priority notification around that book, make sure you've got a membership on simondixon.com. Also make sure that in that membership, you can leave some feedback. Let me know what you'd like in the book. I'm also gonna be leaving all the open source stuff and the commands, AI commands to build your own plans.

Everything's gonna be hosted in there. And that's where I back up everything. In case YouTube takes our content, I back it up over there in our own hosted environment.

In case YouTube takes me down, please follow me over on Rumble. I've only got like 2,000 followers on Rumble. I think until YouTube gets very aggressive, no one's doing that.

But please help me build that because we may need to transition to Rumble at some stage. We're approaching, I think 180,000 subscribers on YouTube. Last time we checked, about 26% of you that watch these videos regularly, aren't subscribed.

So please subscribe. That's all I ask for. So that we can get this content out to more people so more people can protect themselves.

Help the algorithms like, follow me over on X. I'm starting to ease back in after writing my book. I'm giving more analysis over there, at simondixon.twit. And also, I'm looking to make the transition to more decentralized social media, Nostra. I'll make sure I'm promoting, I need to add the Nostra link to the website.

I think I'll make sure that that gets updated and it is on there. Because we need to start preparing for more decentralized social media platforms, more decentralized identity now that we're decentralizing money. So please do, that's all I ask.

And I'll keep covering this content each and every week. And all the content will be backed up with content that you can't get anywhere else on the Simon Dixon Hard Talk membership portal. So always remember, you are alive in one of the most interesting, exciting and scary times in financial history.

Some are gonna get wrecked. Most are gonna get wrecked. Others are gonna do very well.

I wanna make sure you're on the right side of that change. I wanna see how we can do this within our own sovereign community with a bit more peace, love and unity. And I wanna enjoy the part two where we'll be covering the privatization of Israel.

I'll see you this time next week and let me know what you think about part two. Peace. Everybody asked me what's gonna happen to Israel.

I think it's being privatized. I think it's being acquired and I think it's a distressed asset. And I think Netanyahu is facilitating that, not for Israel, but for real power.

And so does Israel rule the world or is Israel part of a greater power structure? I was invited onto a podcast by Wally Rashid to answer that question. Let's play it now. I'm here today with Simon Dixon.

He's an investor and geo-financial analyst. We're gonna be discussing the Iran war and the Middle East in general. So Simon, thank you so much for joining today.

Yeah, thank you for having me. First time on the channel. So I'm really excited about it.

Likewise. Well, I wanna start off with the Iran war. You know, where are we at right now and where are things headed? Because we keep hearing on the news, new updates that there's a ceasefire, that there isn't recent escalations started up again.

So what are your views on the Iran war where we're currently at and where we're headed? Yeah, I take a slightly different take on it. So a little bit of background. I tend not to see this as a war between nations.

I tend to see this as a war between different power dynamics. And by that, what I mean is that when I think of Iran, I think of a couple of factions. And I know it's a bit of a weaponized phrase, but I, for want of a better word, you know, there is the Iranian government and then there is the IRGC.

And just like within every country, there are different power structures and power dynamics. And so I believe that the IRGC is the military arm of Iran and the Iranian government represents the China aligned more pragmatic ones that have been negotiating with America throughout this whole process. And so you get a little bit of good cop, bad cop in that dynamic.

Then when I look at US and Israel, I see Israel as what I call a node of the military industrial complex. So I don't see a sovereign country. I see a country that represents war and military profits.

And Netanyahu is part a pawn in that power structure. Then when I think of the US, I think the US of as a node in what I call the financial industrial complex, which is Trump is hugely aligned rather with global financial powers. And so his job is to kind of acid strip America and end the world reserve currency.

So when I look at this wall right now, I don't really analyze in terms of the same thing. Now, I do believe that today we are witnessing the change of an empire. So in terms of generally big, big, big geopolitical macro picture, we are witnessing the end of the US dominated dollar hegemony and we are transitioning toward a multi polarity based upon many different regional players and different power structures.

So in making that change, there are very many things that need to be sorted. One is energy flows. The other is access to strategic choke points like the strata for me and other ports.

The other is how you price things, petrodollar global reserve currency, clearing and payments currencies. And to me, when I see this war, I see a realignment of the world with a bunch of countries that are posturing for power, but generally we're in what I call bounded escalation. What that means is that there is a major stress in the US market, the bond market, and also inflation and the price of oil.

There is an economic pressure on Iran that is relieved through China. And China is partnered with both Iran and many of the other Gulf countries in order to try and get a steady flow of energy. Put all those power dynamics and if you're analyzing US versus, US and Israel versus Iran, then I can see how this would be very confusing.

If you switch the power dynamics to what I believe the main powers are, everything that's happening right now is pretty logical. It's a military negotiation because at the end of this, we're gonna have one of the biggest changes that we will ever witness in our lifetime in terms of where the power dynamics land at the end of this. So if you look at the MOU, you have a $300 billion investment, which is on off, on off, now it's off.

Whoever makes that investment sets the order. You have a toll charge being charged on the straighter for lease. You have a relief of sanctions that releases significantly more oil on the market, which would be priced either in the Yuan or it would be priced in the local Iranian currency, or it will be priced in dollars.

And you've got sanction relief that will release a bunch of money. And whatever the end result of that is, that impacts all of the Gulf countries, China, and Iran itself. So we are in, I believe, a bounded escalation where we're not gonna enter into World War III.

The IRGC power dynamics are gonna remain, but we are transitioning to a world where China's more important and America's more regional, rather than the key defining player in the Middle East, is how I see it. What is the timeline for that? You know, I think a lot of people also notice that the United States empire is weakening, but when you say that we're gonna see the United States return to a regional power, what is the timeline for that? And then what is the timeline for the loss of the United States dollar as the global reserve currency? Yeah, so there's a couple of things there. The first thing is if you look at the British empire to the American empire, that was a 10, 20 year transition.

I believe that you could look at COVID as a defining moment. Then you could look at Trump tariffs, and you could look at the closure of the strait for me. So the British empire, you know, its moment was the Suez Canal when it could no longer defend, you know, after World War II, after the new monetary order was set up at Bretton Woods.

So that's around 44. Then in 54, 10 years later, you had the Suez Canal moment. And then 10 years after that, you just had a slow environment where the stock market in Britain was doing incredibly well.

The bond market was dumping more and more debt on the British people, and the growth of the economy was decoupled from the markets. And then that just carries on, and it's like a slow depression, a slow transfer. We're witnessing a similar thing in America right now.

Now, in terms of world reserve currency, there is, you know, world reserve currency means that it comes with a massive obligation, which is you have to export dollar debt globally. At the moment we're witnessing that foreign central banks and foreign countries are less willing to purchase loans to the US government, i.e. the bond market. And so therefore the US is trying to find ways of dumping the debt on the American people, rolling it up into pensions, increasing the treasury budget, and probably eventually the federal reserve will have to purchase that debt as well.

So this is not a fast thing. This is not a big move, you know, it takes like, it's normally a managed transition, and you leverage America and the American military to gain access to as many assets. You know, that's kind of like explains the Venezuela operation, explains the Ukraine operation, and also the Iran operation as well.

So it's not a sudden crash. It's a slow asset stripping, where all value leaves the economy and shifts over to the markets. And that's exactly what we saw from the British to American transition.

This one's a bit more complicated because with the Dutch to the British, to the British to the American, there was a very clear handover. In this one there's no clear handover because there's multi polarity, and there's a non-aligned rising force in China. So this one's a bit more messy, but I expect this to continue into another decade ahead in terms of really realizing what's actually happened here.

Yeah, so with Israel, I take this Iran war as, you know, definitely pushed by Netanyahu for Israel's interests in the region. They've been wanting Iran's government to collapse for a very long time. They started off with funding and arming the protesters and that didn't work.

And, you know, so now we're here. Do you not view that as the main driver then? Or can you explain where you see that narrative fitting into your view of the situation? Yeah, I think people go through, so I see it slightly differently. That is true if you stop at that layer.

Most people have come to the realization that there are lobby powers in America that are more powerful than voters. And I think many mainstream Americans are starting to understand the power of the Israeli lobby, an APAC. You know, since October the 7th, that's been a bit of, you know, many people would have been aware of that, but others just become mainstream narrative now.

What people never ask is, what about the Israeli lobby on Israel? And so Israel is not a sovereign country, like America is not a sovereign country. America is mainly owned by financial, military and technical companies. And those lobby powers, whether it be for, you know, they dictate, you know, they write policy through NGOs and various other things, and they pay for politicians.

Now, Israel and the APAC lobby is a lobby that's aligned with military. And so there's been a very, there's always been in the American empire big money laundering operation, where America prints the money, dumps it out on the American people, launders it through to Israel, and then Israel spends it back on military companies, which props up the market. And so war becomes a stimulus for economic growth.

And so Israel's role in this power structure has always been to serve military companies. It's why right now in Israel, the economy is decoupling from the stock market. So the stock market in Israel is at all time highs, which is mainly military companies, technical companies, and some banks.

And so when you laden the country up with debt, so its debt is increasing, it's debt to GDP. It's privatizing more and more of its military stocks. And so we've got two of the big Israeli defense companies going public and selling some of the state assets off.

We just had a deal signed with Greece, where Greece is getting 25% of the military production of their agreement with Israel done in Greece. So that's taking away much of the, that would normally have been done in Israel. So what I see is Israel and Netanyahu as a puppet to power, just like America and Trump is a puppet to power, just like Keir Starmer in UK is a puppet to power.

And so Israel is more aligned with military wartime profiteering. And when you say Netanyahu wants this, there is a dynamic that Israel's role is changing in this new power dynamic as it were. And Israel's new role is what, I think people, the political system in Israel is kind of fighting for.

And Netanyahu was a very useful nose to companies like Lockheed Martin, General Dynamic, BAE Systems, Albert Systems. And right now I believe that there is a change in Israel's role. And Netanyahu is just a puppet as big as Trump is.

And so what I encourage people to look at is ask the same question. People seem to be able to understand the Israeli lobby in America, but what about the lobby power within Israel? And who does the Israeli government answer to? So these global financial investors, because I like your worldview and I guess where I always, what I always question is, don't they, I mean, a lot of these investors, they themselves are ideological Zionists. Is there no, does ideology not play a role in it? Or do you think it's very rational in the way that these financial investors consider these sort of actions? Yeah, ideology in my understanding of the world, and I used to work in investment banking, so I kind of understood some of the dynamics in, you know, I've seen pitch decks where you have to pitch that to come out of a war, peace needs to be 100 times more profitable.

And so war is a mechanism for acquiring resources, building back, getting new contracts, acquiring resources, vassalizing a country, you know, regime changing leadership, and just really subordinating a country to private corporate power. The, on the, I lost my train of thought, what's the question again? Remind me very briefly. Yeah, I mean, I just questioned, I like your narrative, I always think, okay, where do, are some of these global financial investors so Zionists that they'd rather put Zionism above financial markets and advances real interests at the expense of the global financial markets? Yeah, so ideology drives human behavior, but capital doesn't care about ideology unless it's a weapon.

So if you wanna recruit an army in Israel, then you radicalize Jews into not wanting to live anywhere else but Israel, you weaponize and use antisemitism to recruit, and you radicalize evangelical Christians in America to justify war, you radicalize Muslims and create covert groups like ISIS and Al-Qaeda, and you use ideology to recruit an army like the IDF. And then that's very useful for military power because you can create divide and conquer narratives. Now, the most useful politicians are ones where there's a lot of ideology behind the narrative, but then they work for lobby.

And so Israel is a radicalized population in general. And I think of like the IDF, like a group like ISIS and Al-Qaeda, they've been radicalized, but at the higher levels of leadership, they serve a very rational agenda. At the very top in capital, they don't care about ideology.

It's not, Zionism is not something they look to preserve. Politicians may be Zionists, but politicians are just puppets to real power. So at the higher levels, Zionism is just a useful ideology for recruiting an army of radicalized Jews.

And then using that in order to put them to war with Muslims and then create divide and conquer operations and get evangelical Christians in order to push out that narrative. And now those people may believe in it, but at the higher levels of power, I don't think ideology drives it. It's pure country rational self-interest.

And it depends if the country is subordinate to corporate power. And in corporate power, they couldn't give two shits about Zionism. When Zionism is profitable, they'll use it.

When Zionism is no longer profitable, they'll dump it. And right now, the reason that I think you're getting a bit of a shift is because the whole narrative around Israel and Zionism, it was a very, you know, it was obviously since October the 7th, it's had a faction of power that had been allowing the alternative narrative to get out. At the same time, there are people that are holding on to their own narrative.

You know, the old narrative of you must protect Israel, it's God gave us the land and the evangelical Christians and neocons supported. But to me, that's just for public consumption. That's just for media.

Real power is just ruthless money and power. With the Strait of Hormuz, maybe about a month ago, like major shipping companies came out and said that it is, they will not tolerate a tolls through the Strait of Hormuz. And they were basically stating that it seems like to the United States to take some sort of action to stop that.

What does the day after look like? Well, the international community will financial markets tolerate the idea of Iran continuously holding the Strait? So I don't think Iran will, my prediction, in my opinion, would be that I don't think, I think Iran will charge a toll. But it would be done in conjunction with Oman and Oman is part of GCC. And GCC is normalized between Iran via China and China has their own interests and private financial power, the fig.

We'll all be jockeying for what their toll booth looks like. And whatever happens in the Strait of Hormuz will happen or will set a chain of events over the next decade that removes the post-World War II Bretton Woods order, where one vital part of it, not just the petrodollar and other parts of the dollar system, it was the free passage and protected by the American Navy. That is what is being completely disrupted within the Middle East.

And so I'm very interested in the nuance and the detail of how that fee is charged. I believe it will be charged. I believe there will be reconstruction $300 billion agreement.

I believe there will be sanction relief. I believe there will be Iran continuing its membership of OPEC. And all of these things, they completely change like the Middle East, how it's historically worked.

So I don't think it will be Iran on its own. I think it will be Iran with Oman and Oman will be some kind of covert deal that serves the interest of China, the financial industrial complex and the Gulf countries as well. That's the process I think we're going through.

The United States right now, these escalations restarted. Is this all part of seeing how they can get their, how they can get the best bargain out of these negotiations? And is that really kind of what we're seeing right now? They're all just fighting for their best interest, get the best out of they can out of this negotiated settlement then? Yeah, so in my opinion, again, America's not a sovereign country. So Trump doesn't work for American interest.

Trump works for global finance and transnational capital. And so he's getting the best deal he can get for big oil companies, big finance houses. And if you analyze it from this perspective, what everything Trump's doing is quite rational.

If you analyze it from the perspective of he's serving the American people and the empire, then nothing's rational. It'll be completely, every headline will send you on a crazy loop. Netanyahu is most likely going to be regime changed and there's going to be a new leadership within Israel, but in the timing.

So we've got the elections and the political process that's starting in October. In order to get political votes in Israel, you have to be a radical Zionist and you have to be doing the things and the posturing the Netanyahu is doing. You also need to continue the land grab to get more leverage.

And you need to continue the drop beating with Iran. And so all of those things is things that Netanyahu will be using in order to get more leverage. Trump is, if you look at it, they go back to the table and then via Pakistan and Qatar, and then they get a new bound of escalation.

And with each round of escalation, you tend to see more hardliner members of the IRGC that are no longer with us. And then it goes back to the table. And then that keeps happening until I believe a deal will eventually be done.

And again, the reason that Trump seems so irrational is because I don't think Trump knows what comes next. He's being told what comes next. And that's not coming from Israel.

That's coming from financial powers. And Israel is also posturing because there's a real big change happening. So I do genuinely believe that if you think of more of like a battle between the military and Netanyahu, the financial and Trump, with a narrative on top of it to make it look like Israel is in charge and they're calling all the shots, that's kind of how I see it.

And this is something, the timeline could be this negotiated settlement, sometime during Trump's term, likely not after he leaves office, trying to have it done before. I mean, there's a lot of hypotheticals, but... Yeah, I've got the timing wrong. I thought it would have been done by now with my previous predictions.

I thought this would be more like the 12 day war where it was quite theatrical. I was wrong in terms of timing and the speed at which they're actually getting stuff done. But to me, when we saw the Mecca agreement between Turkey, Saudi and Pakistan, I think there's very strategic things that are happening in an order.

We're seeing the Hamas stand down and the deal there, but with continued escalation from Israel, committing more crimes against humanity in Gaza, and we're seeing more land grabs in West Bank. But I think that's all posturing for land because it's gonna be negotiated back in the next order. We're seeing Saudi and the Houthis and Yemen acting more like political instruments rather than alignment with Iran.

I think Yemen's going into its own negotiation with the Houthis, and the Houthis will be integrated into a political process and a military process. I think we will see the similar things within Lebanon. And to me, Iran in this deal or the pragmatic elements of Iran are no longer funding resistance, but there needs to be a transition to integration between country, state, politics.

These are very complex things. This has been like a century of size Pico, Middle Eastern colonialism and all stuff, where effectively, when I saw that Mecca agreement, you've got the military might of a NATO member in the Middle East with Turkey that has a huge manufacturing base and drone production with the financial might of Saudi Arabia with the seasoned military of Pakistan and nuclear power. Now they've signed their NATO agreement.

There's been rumors that Syria will probably sign on, Bangladesh will also sign on. And eventually I believe Iran via these China normalization deals will be. And so right now, what is Iran doing? It's taking the US out of the region.

We're led to believe that the Middle Eastern Gulf countries don't want that. I believe the Gulf countries do want that. And there's somewhat of a theatrical element to this because effectively, US has been expelled from the region.

And now you get new defense contracts, new security agreements, even UAE, looking like UAE left OPEC. That props up the petrol. So when you have leaving from OPEC in these different things, to me, this is all signaling strategic sequencing into a new world order where the Middle East will no longer be dominated by America and China will be the most important strategic partner in the region.

With the Mecca agreement, I think the way I viewed it is it actually, I liked hearing that. I felt like it would bring stability actually and it was a way to reel in Israeli aggression because immediately after Israel stated that they're strengthening ties with India, the UAE, Somaliland, and they seem to kind of signal this thing called their hexagon against Sunni aggression. Where do you see the Mecca agreement, if you could elaborate a little bit more on how does the global financial market view that and what's its role there? I think it's the biggest change that we'll witness in our lifetime and I expect it to grow from here.

I think it will hold. It's slightly different to the NATO agreement. It's not where NATO was built out of aggression towards the Soviet Union.

Whereas this Mecca is genuine defense. Now people will say, people are trying to spin it in terms of it's a unification against Iran or it's a unification against Israel. Pick your geopolitics is neither.

This is genuinely in my perception. The unification, they called it Mecca because that's a unifying terms across Shia Sunni non-sectarianism. And so I expect Syria to be joining.

I expect other countries to be joining over time and I think eventually Iran. I think it is the foundation of a post non-US world order where Middle East becomes more like West Asia. So I think it's the most significant thing we've ever seen.

It doesn't work in the same way. It is about building their own military manufacturing. If Egypt joins, which is Turkey invited Egypt and the historical tensions between Saudi Arabia, Turkey, Egypt.

The facts that we're now getting these new agreements and Turkey invited Egypt. Then you've got Africa, Pakistan, Asia and Middle East. This is the empire's worst nightmare.

This is why covert operations were waged across the British and American empire to prevent such an allegiance and alignment. And so what do we need in order to get to that stage? Well, Iran needs to get rid of the US bases. The militias need to be integrated into regional state power and then new agreements that say a country can call upon the others if they want to bring someone into any type of, and that forces a new integration between Iran and the Gulf countries.

And as much as I'd love Israel to get justice for everything they've done, I just have to be pragmatic here. I think they need to be, they will be reformed and forced into a new, because here's the thing, the negotiation I believe is with global financial power. Global financial power is no longer profiting from the forever war in the Middle East.

This is the last part before they return home, before they escalate in Europe, before they escalate domestic terrorism in US. This is America being contracted into a regional power and the military will then only be able to arrange war in the Western Hemisphere after this. So this is a radically, radically changing time.

And if you look at all the contracts with Lockheed Martin, General Dynamic, Raytheon, their budgets are moving towards artificial intelligence, cybersecurity, significant budgets in terms of escalation in Europe, but more regional stability negotiations within the Middle East. And so these are all the final posturing between different powers that are trying to get as much power in this new order. And I believe we enter into an era over the next five years of regional stability that we've never seen before.

Oh, and I feel like there's evidence to back up your claim Saudi Arabia starting to really do investments with Syria in a way that I personally like it stabilizes Syria. I think there was a large optic fiber contract that they made. I can see that, but Israel is a destabilizing force.

So you mentioned a negotiated settlement. You can't have a stable Middle East with the Israel-Palestine conflict. So how are the financial markets viewing Israel now? It seems like Israel, since it's a destabilizing force, how does that negotiated settlement play in? How would the financial markets pressure for that? Can you explain a little bit more with the Israel-Palestine conflict playing into that story? Yeah, so let's look at a couple of players.

So you've got, for example, many people see the president of Syria based upon his ex-ISIS position. And because ISIS has historically been weaponized by Mossad Western Intelligence and CIA and MI6, they see him as an Israeli puppet. In reality, he was, when Saudi power was aligned with Western military power in the old petrodollar environment, you had this kind of radicalism and he pretends that this was about religion when really it was about destabilizing countries.

But people like the president of Syria, they're shapeshifters. If you ask them to be a militant, they'll be a militant. If you ask them to be a president, they'll be a president.

But he was primarily a product of Turkey and the Gulf countries and Saudi. So he represents their interests. Israel is posturing for additional land grab.

And Israel is being privatized right now. So it's been loading up with corporate debt. Many of these state assets are being put on the public markets, which means ownership changes.

UAE is purchasing many of those assets, which changes the dynamics in terms of financial transactions. India is also purchasing some of it. And I talked about other deals.

Netanyahu is preserving his personal interest right now. But eventually he'll be changed with the political environment that's happening in October. I believe the sequence of events that needs to happen is there needs to be some kind of agreement from IRGC into the new regional order, which will be represented by some kind of MOU or something, which I think we'll eventually get to.

Once that happens, then I think you'll get regime change into the political process in Israel. And then it will be a more Gulf friendly that will lead to a Palestinian state normalized by Iran, China type of Israel, which I know people find very hard to imagine based upon what we've seen. But I don't think Israel is gonna be backed by the US military in the future, which means that Israel's world changes.

It's being funded by a debt rather than Pentagon budget. That changes everything. And so if power no longer needs Israel as a destabilizing node, then they'll regime change Israel and change Israel.

It's as simple as that. Will there be a fight? Will there be a battle? But if you believe that Israel is a sovereign state that's ultimately in charge, then you can't imagine how that happens. If you believe that it's actually subject to military companies negotiating with banks and financial companies that want regional stability and sovereign wealth funds, then Israel will be put in place when the time is right.

But right now it's posturing and improving the negotiation position of the financial industrial complex. You're saying Israel is being privatized and it's selling off its assets in comparison to other countries. How would you say that this is very, like Israel has really sold off itself to where now these financial markets have a lot more pressure on Israel to the point where it can actually make these fundamental changes or is it still in the process of it? Like where does it fall? Like from Venezuela type privatization where it's basically a puppet to where it is now, how money, where would you put Israel on that? So I think you can look at more.

So there's a couple of state defense IPOs coming up later this year, in November and December, which is albeit system, some of the key assets of Israel, they're going public. Once they go public, it means that gold funds can buy them. And when gold funds in the Abraham Accords can buy them, then that buys you more influence over military.

And as I said, when you look at the devil of the detail of every deal, like the Greece deal, people are like, oh, that's evidence that Greece and Israel, Israel controls Greece. If you look at that, they gave up about 25% of the purchase of the production of intellectual property into Greece as well. So bit by bit, it's a slow process, but I believe Netanyahu is privatizing Israel, trying to be useful to power, get as much leverage, appease the radical Zionists, the want blood, and that's a very shifting role.

This has been a long time in the making. But yeah, it's becoming less and less sovereign if you look at many of the deals that are happening. State power is being replaced by private power and it's being loaded up by debt rather than funded by Pentagon.

And even, I know we have a narrative around like, Israel being merged with the US army. To me, that's more of a reflection of reality. The Israel has always been a mechanism for laundering and having plausible deniability for the deep states crimes against humanity.

And so, when you get Israel to do it, you get the whole story that America can blame and say, hey, this isn't us, we would never do a genocide. That's those Israelis. And I don't want to diminish because the radicalization and crimes against humanity that Israel commits are vast.

And if I put my humanitarian hat on, I'm with you. In my humanitarian hat, I'm very much on the side of Palestine, but in my power dynamics hat, in my analytical hat, Israel's not in charge. Israel is just a puppet of US military contractors and technology companies.

And so when Palantir, which has floated on the US stock market, needs to test genocide as a service, use Israel and Palestine. When you need to test occupation as a service, use Israel in the West Bank. When you need to test drone integration, use Ukraine.

When you put all the value flows back up to the most liquid capital markets in the world, which is the United States. And some of it remains in the Israeli stock exchange as well. When there is the sort of negotiated settlement, you're saying that where the pressure is gonna come on Israel is because of the Gulf states, a lot of these other major financial markets are gonna have so much sake that you're gonna be able to pressure Israel into a settlement.

What about the on the ground things like violent settlers, these militias trying to spark some sort of civil war. Will the financial markets be so strong that those things will figure themselves out because any sort of negotiated settlement right now with what's happening on the ground, it looked like it could lead to something like that. Yeah, so there's a couple of pressure points here.

So you've got Iran and the military action of their superior military industrial complex. Israel is kind of a lot of what Iran has done has taken out all the much of the technical industrial complex nodes in the region. So many of what allowed it to have the iron dome and various different technology, that infrastructure is dead, it's gone.

And it's probably not being rebuilt. So right now, the current justification for Israel relies upon what I call the resistance economy. If Iran is entering into a deal, then the purpose of Israel to the military is no longer there.

So then Israel needs to find a new form. And if America is not needing to destabilize the region because financial powers are investing by a Syria and all these different deals that you're seeing across Iraq and Syria, World Bank deals are being done, visa integration into payment systems. UAE has a network of central bank digital currencies, which clears outside Swift.

Many of this China integrated infrastructure means that Israel will have no choice. Now, many people over the next five years, Israelis, the radical Zionists, they'll just leave and all of them have less. Their population has been declining.

They've gone to Cyprus, they've gone to Thailand and they're kind of left with just the severe radicals. But in the end, all land conquested through Israeli terrorism, which is state-sponsored terrorism. That will eventually be part of a negotiated settlement, I believe.

And then eventually we'll get back to the deal that Hamas agreed to, which is kind of the stalemate at the moment. They're saying we won't hand down our weapons until Israel is retreated. And we've got an Arab army defending.

And then Israel saying, well, we're not gonna retreat. So there is a sticking point, but nothing stops this train in my perspective. This will be eventually, there will be a Palestine.

Palestine will become more significant. I don't think it will be free. I think it will be funded by the same type of infrastructure of the $300 billion investment that Iran will receive, which will be most likely Gulf, China integrated, and some compensation to the financial industrial complex for allowing the military to leave and end the forever war.

Nothing stops that train from all the financial flows that I'm seeing. But you have to have some patience because this isn't fast. This is big power dynamics changing.

Yeah, I think rationally I see a lot of that happening. You mentioned terrorism and the West as the financial industrial complex really starts to take foothold in the Middle East and the military industrial complex retreats a bit more. You stated it will start to really prioritize the West in domestic terrorism and fueling conflict in Europe.

Can you elaborate a little bit more when you say fueling conflict in Europe? Do you mean continued Russia Ukraine aggression? And when you say domestic terrorism in the United States, what's that look like? Do you elaborate on that? Yeah, so when you look at the balance sheets of military companies, their revenue never goes down. It just goes to a new location. So if you ever want the military to settle a war zone, there needs to be a new one for it to go to.

And if the American military is becoming more of a regional power, it will be looking at where it can exert its influence. So you've got Central South America, you've got Europe, and you've got domestic. And so what you've seen is that companies like CoreCivic, CEO Group, GEO Group, they've built a whole infrastructure around, you've got the highest level of incarcerations in America in the world, like 4 million people in prison or something like that.

They built a whole privatized prison sector. Palantir has been utilizing via immigration policy testing a lot of what it's been testing around the world for its police and surveillance state. The Clarity Act and Genius Act and the Department of Government Efficiency built a lot of data.

And now you've got programmable stablecoins and central bank digital currencies, programmable financial instruments. You've got social credit scores being built using X and algorithms. And so what you can see is that America's preparing for a police and surveillance state.

It's kind of being done by the private sector in America, but it's being done at the state level across Europe. So, you know, the governments across Europe are vassalized. They're looking ready for European central bank digital currencies.

There's probably another trillion dollars of profit to be made from the Russia-Ukraine war. And so I'd expect probably another couple of years of that. And further narratives, and you'll see in Trump, he's basically been pushing NATO to increase their budgets.

And you're starting to see a lot of the wealth inequality and deterioration across Europe. This is essentially the military, the covert regime changes, civil unrest, color revolutions, all the tactics that they used in the Middle East and Asia, they're being used at home. And so you're seeing a lot more tensions, a lot more algorithms being used to radicalize people, a lot more people arguing left and right, labor conservative, Trump, anti-Trump, Muslims, Jews, Christians, like every type of way of radicalizing people through algorithm.

I think they're getting ready to manufacture some civil unrest so that they can usher in this police and surveillance state based upon social credits, artificial intelligence. And the destabilization of

Europe, so that the financial industrial complex can vassalize those governments further. And we're seeing that from Central and South America as well.

Okay, so it won't necessarily look like bombs then, but more so, more type of like flock cameras, more surveillance, less like, as what we're seeing this military industrial complex. I mean, obviously they're continuing weapons developments, but it shifts from that in the West to more against surveillance, that sort of thing. Yeah, what I call the technical industrial complex.

So the military and technology are kind of being integrated as more and more of military budgets go into cybersecurity. Right now, it's palantir that's running this war in Iran, and it's palantir that's doing the occupation, and it's palantir that's killing children in Gaza. It's palantir that just targeted that wedding in Iran.

It's a palantir that killed the children in that school. So, you know, these are, this is a brochure for US technology companies and Israeli defense companies that are being privatized and being sold across, you know, what they tend to do, what America and Europe has always done is you manufacture violence and civil unrest, and you come with the solution. And so the more you can manufacture civil unrest, the more you can come with a police and surveillance state as a subscription model for governments to make up for lost profits from the forever war in the Middle East.

Yeah, I mean, that sounds scary in the West, like being a Westerner, it's not a nice idea. It doesn't seem like that'll bring stability. It feels like you're saying more stability in the Middle East and more destabilization in the West.

That's my prediction, yeah. And you can kind of see that with capital flows. And what you're seeing across the West is that the stock market is decoupling from the economy, record levels of debt.

And those debts, as more and more of those countries are being burdened with debt, that's propping up the stock markets. And we're getting, you can see it reflected in bond yields at the moment, like the cost to lend to the US government is blowing out. And with every crisis, you get more concentration of wealth up.

So in the West, we've got K-shaped economies where effectively, if you own the assets, you're getting richer. If you own the debt, you're getting poorer. And that's getting, it's starting to hit its extremes in both America, Europe, particularly UK.

And then what you tend to see is that you get a relocation of wealth. If you look at, if you're a following exchange traded funds, there's more concentration like the top seven, magnificent seven tech companies in the S&P. They're like 30% of the entire index now.

As you add anthropic and as you add open AI and now you've had space sets, that will go to a

40% and beyond. So you're getting tech dominance across the markets. The richer you get and richer, the poorer again, poorer the stock market is 92% owned by the top 10% of institutions and wealthy.

And the same is happening across Europe, UK. And you'll see in the weaponization of immigration policy in order to manufacture such tensions. And so I expect that to continue.

We're entering into this ultra haves and have nots. And so if you live in the West and you own assets, then you're beating inflation and you're kicking ass. If you don't, if you're on the wrong side of the debt cycle, then your life's getting worse and worse and you're not beating inflation.

And you're having to, if you have assets, you're having to sell down more and more of your assets to meet your expenses. And so eventually that type of tension is end of empire type of tension. And you can see that that's why we're seeing just, mass deployment of this control grid and this technology ready for such an environment.

So yes, that's what I see from the West, sadly. It's not quite sadly because that needs to happen in order for the rest of the world to be able to rebuild. And capital doesn't move.

If you look at the ETFs, about 50% of the ETFs is now in emerging markets. That was about 30%, like a couple of decades back. So more and more of these flows are going into emerging markets.

So the FIC is hedging for multi polarity and extracting as much as they can using the capital markets and just loading up whatever amount of debt they can on the government. So with the knowledge that you have, let's say if you're between the age of 20 and 35, you have, I feel like the average person between that age might even have $20,000 in debt. They might be making like an extra $1,000 of spare money a month they can spend.

What would you tell somebody like that? Like your average young adult that might just have 500 to $1,000 a month, how could they do what they can realistically to prepare for that? What would you tell them to do if they had just an extra five to $1,000? Could they do anything with that that would make them a little bit better off in that world that you picture? Yeah, look, there's no other way of saying this other than the people that win in this market spend less than they earn and invest the difference in assets. There's no other way of saying it. So if you're deep in debt, you have a tough decision to make.

Your decision is you can keep paying your debt and go further and further in the hole. Or you can figure out a way of spending less than you earn and investing the difference in assets. However you get there, as long as you do that every month, I think you'll be okay.

And once you're on that trajectory, you're beating inflation. Now, obviously the question comes out what assets, even if it's just the S&P 500, even if it's some Bitcoin, some gold, some commodity index, some emerging markets, you pick your thing. I'm not here to tell you what it is, but you have to earn more assets to outperform inflation every month.

Now, what they want you to believe is that there's no future. They want you short-term gambling. They want you investing in crypto scams.

They want you gambling. Gambling's massive on the rise right now, but it's the long-term plan that makes you win this. The asset owner wins.

And so your job today, this month, is to figure out how to spend less than you earn, invest the difference in assets, and earn more assets every month. And then get better at investing as you progress. There's only gonna be two types of people.

Those that own assets and those that are on a universal basic income. Because eventually, this AI trade is gonna lead to more, I believe, unemployment, more and more unemployment. And so you need to hustle right now, you need to increase your income, you need to reduce your expenses, and every month you need to earn more assets.

Do that, get better at it, you'll be fine. Don't do that. You're likely to be one of those people that has helicopter money, a stablecoin programmable money integrated into your social credit score and balance here, so that a drone can tell you when you're allowed to spend and what not to spend over the next 20 years.

And you just have no choice. Even if it means you move country in order to get your costs down, I can't make these financial decisions for you, but again, long-term plan, own more assets, spend less than you earn, invest the difference, decide what you're gonna do with your debt, tackle it this month and carry on every month. Otherwise, you're not gonna be okay.

Where does gold fit in, not just for as asset to own, but also we're seeing gold rise as the dollar weakens. Can you explain a little bit more about where you see gold fitting into this larger? Do you expect it to continue to rise because of the weakening dollars of the global reserve currency then? We see a lot of people, especially, I feel like in the alternative media space really starting to glorify gold in a way that I don't feel like I've seen before. What are your thoughts on that? Yeah, so the real currency pair to understand the devaluation trade and the weakening of the dollar is US dollar to gold.

It's the most important thing. The things you need to look at is US dollar to gold on the long-term horizon. My personal belief is that if the price goes down, then you get to buy more gold that month.

If the price goes up, then your wealth is going up and you're beating inflation in this trade. You gotta have a long-term horizon, not short-term speculation. I think the gold trade continues to strengthen relative to the dollar.

I think currencies that are connected to key metallics and energy resources, they're strengthening relative to the dollar. And currencies that don't have key metallic resources, refinement capabilities, or commodities and resources, they're weakening relative to the dollar. And then obviously the Gulf countries, they're pegged to the dollar as well.

So as the dollar weakens, they have to sell off their treasuries in order to destabilize, or they have to get an FX swap line, or they have to sell down their gold. Eventually they won't sell down gold. So there will at some stage, I believe, be a deep pegging there in line with the order.

And so central banks all around the world are acquiring gold. So right now, a dollar still kicks ass as a payment settlement rails in terms of its payment, still the best currency in the world. As a saving vehicle, awful currency, but still better than many others, depending on the parameters I set.

Priced in gold, I see it only getting weaker and weaker and weaker, and that is the only one that matters. And so what the key things I expect you to look out for, look out for gold as a currency pair against the dollar, strengthening of gold, dollar weakening, long-term, forget the month-to-month. The yields on the government debt are hitting a major, major problem level.

Right now they're about four and three quarters for the 10-year yield. That sets mortgages. That means everyone's mortgage will get more expensive if they need to refinance.

The 30-year debt is about five and a quarter, or around five and a quarter right now. That is a blowout phase for the US government. They have to get that down.

And the only way to get that down is to manufacture a crisis and do QE. So the Fed will have to start buying those bonds to get those yields down. I believe continual strength within the stock market, the valuations are insane.

It's a very hard trade to time, but all value is going into stocks and real estate in this market, in this fiscal dominance. And those are the bonds are getting wrecked in the gold trade. So the gold trade is that while many of the financial industrial complex are still using US government debt as collateral, and they're willing to do that, foreign central banks are not.

And so you've seen the gold as a reserve asset has overtaken the market capitalization of US treasuries. So foreign country, and you're seeing that in Japan right now as these rates go up. That breaks a lot of things.

The petrodollar is breaking, the euro dollar market is breaking, the Japan carry trade is breaking. These are the contracts of what propped up the petrodollar and the order. And so many are fleeing into gold right now.

And I think over a long-term horizon, gold will protect you from that trade. You mentioned gambling and recently, especially I feel like Kalshi, Pali markets, those are bettering markets. The rise in which, the speed in which they're growing to me is, it's shocking.

And I also feel like, I feel like it has this weird connection. I view it no differently than I view porn or drugs. It feels like it's being sold unregulated.

And I feel like it's not something that you can strategically map out. It is gambling in a way. When you stated gambling, is that, were you referring to these betting markets as well? Can you explain a little bit more about their rise or how you view their rise in this sort of narrative and lens? Yeah, the rise of 24 seven gambling markets, via the crypto, what you saw is you have Bitcoin and then you had the crypto market.

And crypto was Silicon Valley, SIOPs that are building programmable tokens, money, pump and dump scams, stable coins, central bank digital currencies, gambling markets, prediction markets. And so there's kind of Bitcoin, which is on the debasement trade. It's on money.

It's not owned by anybody. Then you have crypto. And one of the big use cases that are coming from that is stable coin, which is a mechanism of creating a programmable dollar backed by debt.

Tokenize everything. This is the World Economics Forum, BlackRock, you will own nothing and be happy. We'll custody the asset.

You get a token. The prediction markets is the number one user case that's come out of the crypto besides stable coins. And that is using blockchain assets in order to predict markets.

And it's very concerning, as you said, it's kind of addictive, like end of empires, like kind of all republic. You get record levels of degeneracy. You're seeing the rise of only fans where women's looking at, neo-prostitution in order to supplement their income.

Men and boys are looking at gambling and crypto trading and trying to get a 1000x return. And many of these markets, the real money can manipulate the gambling, those markets, because when you got real capital, you can put it behind these bets and it becomes a self-fulfilling prophecy. And then the retail gambler, it's kind of like the house never loses, right? It's the same with these things.

If you got real capital, you can manipulate the markets and they're currently being investigated for it. So yeah, one of the growth of this crypto gambling and gambling sites is a concerning trend. And I think it's a real reflection of the youth trying to make fast money and then being manipulated by real power that's able to push and control those markets.

It's a very concerning thing. Everything's about driving you to not believing there's a future, having a shorter term impulsive behavior and that makes you easier to control. When you're mentally weak, when you're unhealthy, when you're addicted, whether it be pornography and you're not having children, whether it be gambling as a financial vehicle, whether it be even only fans and prostitution, these are very degenerate types of behaviors that is designed to get you more weaker and weaker and weaker and then more subordinate to the system and this police and surveillance state.

So yeah, you have to counter these trends and you have to be aware of them. You have to understand what the algorithms are trying to do to you right now. They're trying to turn you into the most radicalized version of whatever your ideology is and that is a weapon that is being used.

So at the same time, you need to recognize what the opportunity is here. AI is changing everything. It is a control grid, but at the same time, it's making people productive where they can create things that they can never have before.

So there's a yin and yang for everything here. There's a good and evil in everything and you need lots of mental strength to recognize that, to see through the SIOPs, see through the manipulation, make sure that you're not falling for the behavior that they're trying to drive you in and then utilizing this technology for what it is today, spend less on your own investor difference, accumulate assets and build a future and this is what we need. Yeah, you mentioned the rise in degeneracy and I agree and it's not in, I'm not even saying it in a moral way from a religious perspective or anything.

I'm very culturally, I'm very to the left, but it's this imposement of things that make you feel good in the moment, but long-term, they don't make you feel good. Like the predictive markets, it's very short-term gratification, only fans, but yeah, it is being imposed. I'm not blaming the younger generation.

I feel like it's something that's being pushed on them that it hasn't been pushed to the same degree on older generations. Yeah, and you're seeing a bit of a divide and conquer in weaponization of that as well between the youth and the boomers, right? So the boomers have their real estate, got their stocks. There is going to be a big wealth transfer from the boomers that are in that age where they're retiring.

There is a pension crisis. Then the youth are gonna inherit those assets. These demographic changes, we're touching upon a lot of change here right now.

And that was those that were having children after World War II. And there is definitely a tension that you're seeing between the youth that are still saying, I'll never own my house. If I'm to give some advice to you, you need to understand there is a new game.

The house is AI. The opportunity today is for you to support those who made this transition to AI because nothing stops this train. Like this AI and robotics economy.

There are lots of people that need to adjust to it. If you're young, dive into that, figure out how to help people transition to that world. It's one of the biggest changes we've ever seen.

There's no fighting it. There's no stopping it. Unless you can go out and go off-grid, very few people can do that.

You need to increase your purchasing power. Avoid these degenerate activities that drives you into short-term thinking. And recognize that this is the new house.

Understand that assets and your savings are very different to what the boomers live from. And then eventually if you get the asset accumulation phase right, you'll be able to buy your house out right into the future in 10, 20 years or something like that. But don't start with the house because that economy is dead.

You're not gonna increase your wages to be able to buy a house. You're gonna end up a dead slave on the wrong side of the trade. So just recognize the world is changing.

Lean into what's happening. Protect yourself and just really guard your mind in terms of everything your screen wants you to do is probably the opposite of what you should be doing. You mentioned young people leaning into AI because that's where the new house is.

What's that look like? Do you mean just invest like purchasing stocks of AI companies? That's what I inferred from that. Are you referring to something different? What's that look like in reality? Yeah, so there's two parts of it. On the investment side, own part of the assets.

On the actual practicality side, become better at AI within your niche, within your passion than anyone else. The whole world, the boomers are gonna have to need people like you to adjust to this technology world that they don't understand. You were born with a phone in your face.

That is both a weapon that has been weaponized against you and it is also an opportunity. So utilize AI that it's never been cheaper to build stuff, produce stuff. There is information and resources that are available to you that was never possible.

At the same time, you know you're building a police and surveillance day with it. So why not build alternative, decentralize? We all need to host our own AI in our own environment. Open source AI can be downloaded onto your own environment.

Everyone needs to do that. We need a digital resistance against the centralizing AI right now. This is the opportunity for the youth.

I look to the youth and I say, that's your ground. You know, you were born with a phone in your face. The boomers, that's not their world.

They're gonna be relying on you to figure that stuff out. And so use it as a mechanism for increasing your income, accessing the right level of information and just turning it into an opportunity but also recognizing the decentralizing and centralizing forces. That's the youth's opportunity.

Then yes, you need to also own some of the AI infrastructure, whether it be stocks and also exit the system. So gold, we talked about that as a mechanism. Bitcoin's another one.

Self-custody Bitcoin, you know, that is a way of controlling your own keys, boycotting the system, storing your own wealth. You know, the youth are the ones that are gonna be able to harness these tools. So that's your opportunity.

And later, if you get that right, you'll buy a house outright. Whereas the boomers were able to live off their house and their stocks get a better job and their wages would increase at a fast or their assets would increase at a faster rate. That's not the world we live in anymore.

I'm glad you actually mentioned local AI. Because I actually, I was going through a moment where I was actually wanting to just purchase my own computer and my own hard drives, actually have it at my house and run a local bot within it, simply because I, as you know, somebody with a, you have a larger public platform, there's concern about your data and everything else. And I think everybody should be concerned whether you have a platform or not.

Is that something you already do? You actually have your own system where you're actually running a local model? Yes, and everybody needs to do it. There's advantages and disadvantages. So, you know, when you use somebody centralizing Claude and like an AI, you get access to the internet in real time, the models are slightly better, but the open source environments running on your own computer, these are really good for building a business on top of your own AI with your own keys.

These are the, I want people to get excited about these opportunities, sovereign opportunities. This is the technology that the youth need to build. And so there's pros and cons to all of it, but this is, you know, if we are moving to a world of an AI control grid run by robotics, which I believe we are over the decade ahead, and it's happening rapidly, then we've got peak centralizing forces, central banks, central AI companies, millet, mikvik, and tick, centralizing.

How do you combat centralization? Well, you do it through decentralization. So if billions of people are running their own AIs on their own environment, storing their own keys, storing their own identity, using decentralized social platforms, this is what the youth should be, this is the future that the youth need to build, and the boomers don't know how to do that. That's where I'm saying you need to lean into the trends.

And we win through a digital resistance. You know, decentralization is the antithesis to centralization. You know, we did it in Bitcoin with money.

We allowed people to own their own money, spend their own money, and have a fixed supply like gold. Now we need to do the same with social data, AI, and, you know, I still rely upon YouTube, but I build my own centralized, decentralized cloud servers, and my own websites. These are the things, and the opportunity to learn these skills just by utilizing AI, like, is the opportunity.

So you need to, I want everybody to be leaning into that, and so that they get excited about that, because one thing I've noticed, I don't know if you see the thing, if you use your phone right now, the world looks really bad. But if you go out in the garden and touch grass, the world's not as bad as it looks. Now, I don't want you to be ignorant about the crimes against humanity that are happening, the Palestinian cause, the Israeli, the stuff like that.

You can't bury your head in the sand, you've got to get that balance right as well. But you do need to, you know, you do need to have, you need to be building your future, you need to understand that this sovereign side is the antithesis to this centralization. And that's your opportunity.

Figure out this stuff, help others figure it out, and I'm sure you'll be rewarded financially, and you can spend less than you earn, and invest a difference in decentralized technology. What open source model do you run? I've been using some of the Chinese stuff, experimenting with the Chinese stuff. It's not as good, but it's catching up rapidly.

And then the problem is, is it doesn't access the internet in real time. So you can use it to run your own models and run your own environments. But, you know, I would encourage everyone to go into their AI, and ask, what are the options for decentralized AI? You know, more sovereign, how do I set up my own systems at the moment? And go down that rabbit hole.

I don't want to advise you on any particular one, because it could be a CCP startup, or something like that. But I want you to go on your own journey of discovery. Simon, thank you so much for chatting with me.

This was really, I found it really interesting. I think it was very informative. Okay, I hope it's an alternative perspective.

I know some of the things, like when you say these things, pretty much I probably said something that everyone will hate. You know, wouldn't pick your hate. But I'm just trying to navigate the world as I see it.

And I think there's something useful in this. And, you know, yeah, we've got a lot of work to do. And they want you to think that it's hopeless and useless.

It's not hopeless, it's not useless. There are big forces. And we all need to be as strong as we can to get through this massive, massive change.

We're all going through major, major change. And we need a strong version of you and everybody to get us through this. Where can people find you online? So I go live on YouTube and follow the money every week, SimonDixon21.

I back it all up on SimonDixon.com in a more decentralized environment. And I'm regularly on X at SimonDixonTwit when it was called Twit. I'll take it in the description.

Simon, thanks so much for joining.