

Hello Everyone,

The Hunger Stones are our subject today.

In support of today's theme, one of my client's brother and sister-in-law just came back from a Rhine River cruise. The Rhine (and the Rhine is a big river) was so low, the cruise was cut short due to low river levels.

I hope you find today's missive helpful in expanding your worldview. :>)

Signed Your Watching-Hurricane-Florence-Getting-Ready-To-Dump-All-Kinds-Of -Water-On-The East-Coast Financial Advisor,

Greg

KKOB 09.10.2018 The Hunger Stones

Brandon: So, Greg, on Friday, I heard you tell Bob that both mother-nature ---and a growing population---were making water more valuable. Then, you explained how to invest in water. But, somewhere in the middle of all that, you said the ***hunger stones*** had reappeared in Europe. So, I have to ask...what is a hunger stone?

Greg: Yes. Sorry. That's a term you don't hear much around here. So, let me set this up. Like the United States, Europe is blessed with dozens of significant rivers that crisscross the continent. And, as with any river, the levels rise and fall depending on rain and snowmelt.

Well, during times of drought, river levels obviously fall. It is then, people living along the banks would see boulders and rocks in the riverbeds they wouldn't normally see when the river ran high.

Anyway, over the centuries, when these stones were revealed, the people felt compelled to carve dates, notes, and warnings into the bigger boulders. Some of these carvings go back over 600 years.

Brandon: So, you're saying the river levels in 2018 are now low enough to reveal the carvings in the stones. I'm curious. What did they write?

Greg: Well, some just recorded the years of previous droughts, which is very helpful in determining cycles and patterns. And, as we all know,

very helpful in determining cycles and patterns. And, as we all know, seasons, weather, sunspots, all tend to cycle.

But, besides dates, some of the markings are more poetic. One says: ***“Don’t cry, girl, don’t fret. When it’s dry, just spray your field wet.”*** Another stone written in Old High German reads, ***“If you will again see this stone, so you will weep, so shallow the water was in 1417.”*** Meaning, start crying. Drought is here. Food will be scarce.

Brandon: So, that carving survived six centuries...that’s amazing. So, now I understand the name the hunger stones. Low water meant there wouldn’t be enough water to irrigate the fields. And, now you’re saying the hunger stones have reappeared across Europe.

Greg: Right...and in major rivers like the Elbe.

Brandon: So, on Friday you said Australia, South Africa, the Middle East and even the American West were all experiencing some level of drought. Therefore, you said, companies that could provide water would likely see an increased demand for their services. But, if I am following your logic on the hunger stones, you’re taking the next step. Since, food and water go hand-in-hand, investors should also be looking at investing in food providers.

Greg: That’s my take. And, look, we’ve come a long way in 600 years. We know how to move water to where it’s needed. With that said, if you must go farther--and deeper-- to get your water, it makes sense that irrigation will be more expensive. That cost will be added to your food bill.

Now don’t think I’m saying famine is at the door. Not every part of the world is experiencing drought. South America is doing fine. We’re not going to starve. But, distributing food to compensate for drought areas, will be more expensive.

Brandon: So, your overarching message is the same. I know, you believe inflation is coming back---because governments keep overpromising, overspending, and overprinting. Therefore, food and water investments, make sense because---as you like to say--- you can’t print food and water.

Now though, you also see mother-nature pushing food and water prices higher. And, you want investors in sectors where prices are rising.

Right?

Greg: Right. You now have two very strong structural trends working in your favor. Governments doing to money what they do best--- devaluing. And, mother nature doing what she does best...cycling. Therefore, as an investor, your opportunity lies in getting ahead of both these trends.

Brandon: I always learn a lot from you. I never would have known about the hunger stones--- much less connected them to investing. How do people reach you?

Greg: Thanks...glad to help. My number is 508-5550, 508, triple 5 zero. Or, go to my website zanettifinancial.com.

Brandon: Before you go...do you still send out transcripts of what we talk about?

Greg: I do. If your listeners want them, just email me at gregradiotranscripts@gmail.com, and I'll put you on the list.

Brandon: Have a great week...and Bob will talk with you on Friday.

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