Degraaf's Tuesday Evening Report July 01/2025 AD, Issue   # 1124

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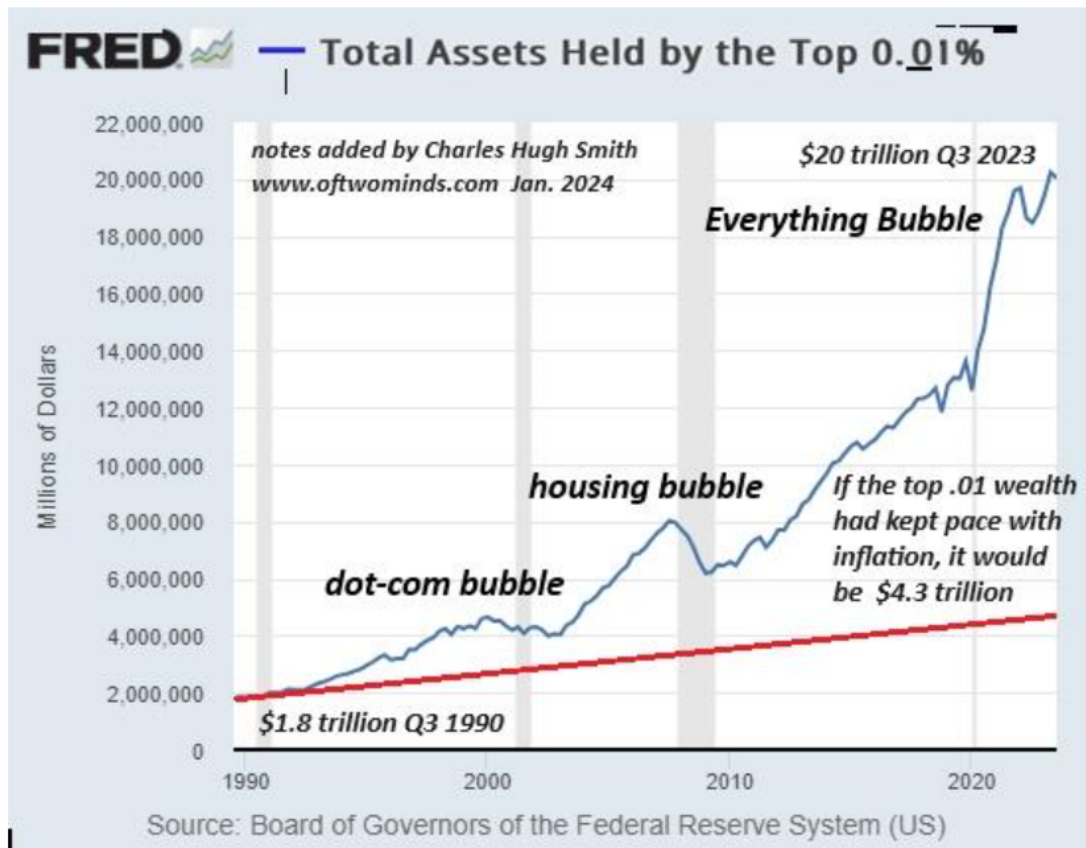
A receipt will be issued.

They say marriages are made in Heaven. But so is thunder and lightning.
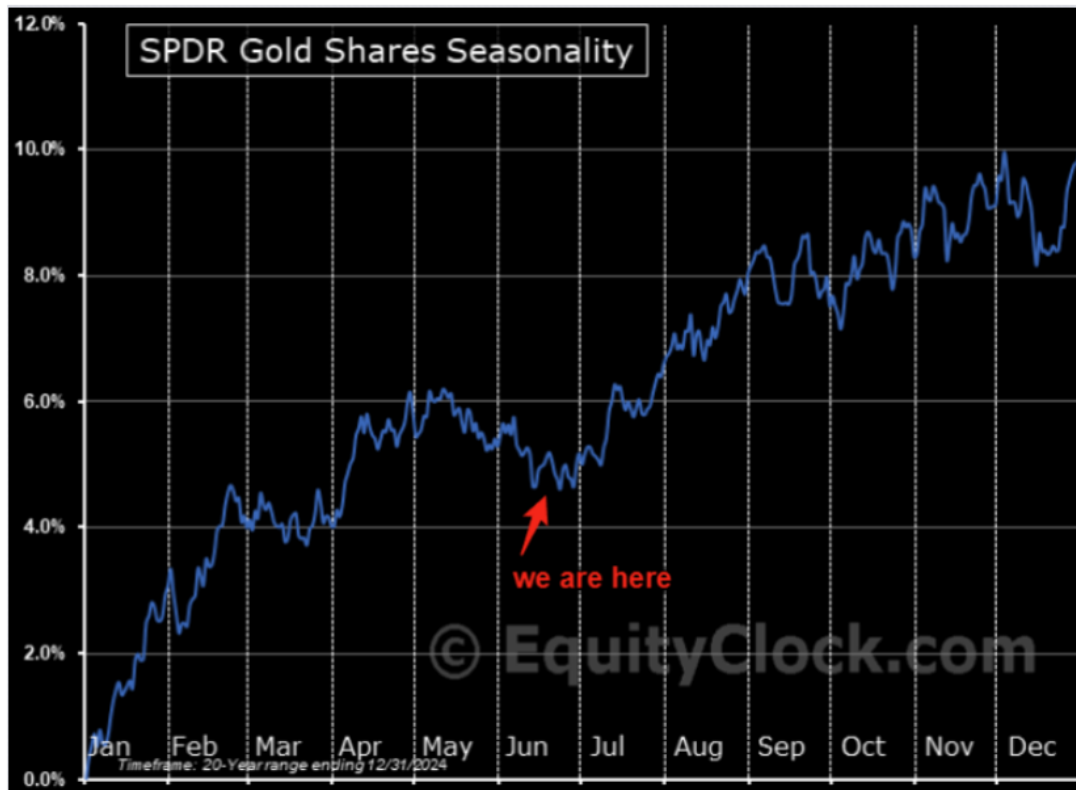
~ Clint Eastwood

Bizwaremagic's Funny Quotes

FRED — Total Assets Held by the Top 0.01%

notes added by Charles Hugh Smith
www.oftwominds.com Jan. 2024

$20 trillion Q3 2023

Everything Bubble

housing bubble

If the top .01 wealth
had kept pace with
inflation, it would
be $4.3 trillion

dot-com bubble

$1.8 trillion Q3 1990

Source: Board of Governors of the Federal Reserve System (US)

This chart courtesy US FED shows 'the rich are getting richer'.
Annotation by Charles Hugh Smith.

Seasonality

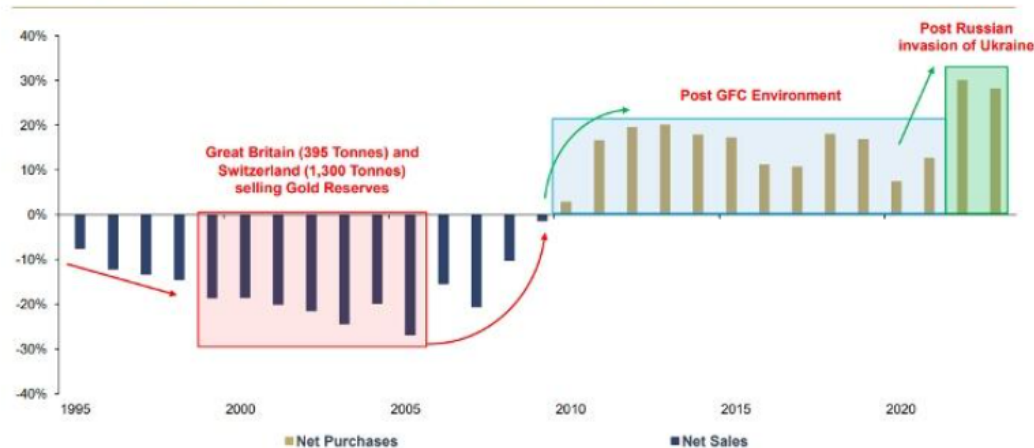Before you get too bearish... Gold seasonality is rather strong from July.

Source: Equity Clock

This chart courtesy Equity Clock shows the seasonality for gold. Notice the red arrow pointing to 'you are here'.

This chart courtesy incrementum.li shows gold purchases by various central banks is ongoing.

Featured is the daily gold chart. I was going to skip sending a report out today, as I expect volume to drop during the week as we close in on US Independence Day.   Then I looked at today's gold chart and I decided to send out a short report featuring this chart.

On Friday price dropped below the 50DMA. A lot of short term investors used protective sell stops there and were closed out of their positions by the 'banksters' who used 'paper gold' in the COMEX to drive the price down.

Notice now the green arrow which points to an upside reversal. This was followed today (Tuesday) by a closing price back above the 50DMA! This makes the Friday decline a 'bear trap. It is my hope that all of you stayed with your gold investments. The blue arrow points to resistance that goes back to April. The expectation is that once price rises above that resistance, the target will be $3,900.00.

The SIs are positive and the MAs are in positive alignment and rising. The number of ounces backing GLD is unchanged. The GDI is unchanged at 75%.

=== >>> MODEL PORTFOLIO
Each report will show the trades that were completed since the last report.

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Since I do most of my trading on the TSX, I will show the stock symbol for the US equivalent in brackets. Note: when trading a pink sheet listed stock, you should always buy or sell using a specific price - never a 'market' order.
To benefit from this feature, pull up a chart for any of the symbols that I buy or sell. Determine if you want to do likewise or wait for another opportunity. If you're not sure of the fundamentals, - click on the website link provided.   Always make sure the index or ETF that represents the sector is in harmony with your trade. I apologize for the short time I stay in some stocks, but this is all based on chart patterns. If the chart pattern changes from positive to negative – I usually run. Here are some of my trading habits:

- **I eliminate all emotion**.   Stocks are simply investments that I use to improve the bottom line. I pick a stock or commodity because I think the chart pattern looks positive. Once I decide that we are operating in a bull market, I don't bother with sell stops - I patiently wait for the stock or ETF to come back into positive territory.
- **When I do sell below my cost, I look at the loss as an opportunity to get into a winner.**
- I use the 20 day and 30 day exponential moving averages at Stockcharts.com to help me decide when to buy and when to sell. Then I draw a channel, just as I do in the reports I issue. As long as the stock stays in the channel, I'll keep it as part of the portfolio, unless I decide to take profits.
- You've heard people say: 'Buy Low – Sell High'. Here is a variation on that advice: **BUY HIGH – SELL HIGHER! It** has been my experience that buying stocks that have just broken out to a new 5 year high have been the best performers in my portfolio. When a stock or commodity has reached this stage, there is 'blue sky' ahead.
- Next I look at the supporting indicators – especially the Accumulation/Distribution line. When a stock or commodity becomes overbought (such as trading near the top of the channel, or making a 'double or triple' top), I usually sell all or part of my holding into the rally. . Over time I try to replace these stocks during pullbacks.
- Finally I make sure that the sector in which the stock or commodity operates, is moving in the same direction as the stock of commodity that I am about to buy.

Here are some kernels of wisdom from a very successful trader, Jesse Stine:

- Emotional intelligence is of utmost importance.
- Discipline is key
- Drawdowns are lessons.
- Patience is very important
- Ignore the news media
- Have faith in your system
- Trade with confidence
- Never get attached to a stock
- Be a contrarian
- Be a lone wolf.

According to an article titled: The Strange Behavior of Gold Investors, by Dimitri Speck (link is here): https://www.gold-eagle.com/article/strange-behavior-gold-investors-monday-thursday

Wednesday is a day when investors usually buy gold early.

2 transactions since the last report.   I took profits in HL at 5.91;   I purchased shares in VML.v at 0.79.   The last 152 closed transactions resulted in 142 winners and 10 losers, producing a percentage of +93%. The reason why our portfolio is large is due to the desire to be of help to as many investors as possible. Our position in 'penny stocks' is always very conservative.

17 positions are 'under water'.   2 positions are 'free' (they have doubled).

My portfolio consists of 75% precious metals, 21% in various other categories and 4% cash.

Here is my portfolio:

AAG.v (AAGFF)   aftermathsilver.com   Exploring for silver in Chili and Peru

ALS.to (ATUSF) altiusminerals.com Base metals royalty incl. Uranium, Potash along with gold and silver

APM.to (ANPMF) andeanpm.com   Producing silver in Bolivia and exploring in California

ARIS.to (ARMN) aris-mining.com   Producing gold at 5 mine sites.

AYA.to ayasilver.com producing at several projects in Morocco

GOGO.v (No US listing). borealismining.com Gold in NV. Sprott is in, also McEwen.

CEF.to CEF   Centralfund.com A Sprott gold and silver trust.

CBR.v   (CBGZF) cabralgold.com Gold in Brazil.

CNQ.to (CNQ) cnrl.com Large Canadian oil and gas producer

COPR.to (CPPMF) coppernicometals.com Exploring for gold and copper in PERU

CXB.to   (CXBMF) calibremining.com Building gold mines in Canada and Nicaragua

DAN.v   (DRRSF)   Arianne-inc.com   Phosphate deposit in QC. The project is fully permitted and shovel ready. Phosphate is used in LED batterieE

DV.v   (DOLLF) dollyvardensilver.com   The company has discovered silver in B.C.

EFR.to (UUUU)   energyfuels.com Producing Uranium at several US sites

ELD.to (EGO) eldoradogold.com Producing gold Canada, Turkey and Greece

ELEF.to (SILEF)   producing silver in Bolivia silveref.com

FDR.V   (FDMIF) fdmetals.com Gold in Surinam

FRU.to (FRHLF) freeholdroyalties.com Oil and gas royalties

FTCO fortitudegold.com Producing gold at a profit in NV. Pays a dividend

FVL.to (FGOVF)   freegoldventures.com   Gold at two sites in Alaska

GHRT.v (GHRTF) greenheartgold.com Gold in Guyana and Suriname.

GOT.v (GOTRF) goliathresources.com Pecous metals and moly in BC

GPAC.v (FSXLF) greatpacificgoldcorp.com Gold and copper in Australia and Papua NG

GTWO.to   g2goldfields.com. Discovering gold in Guyana. Management is experienced.

GWM.v (GAYMF) galwaymetalsinc.com Gold in New Brunswick and silver in QC

HGY.to Global X Gold Yield ETF (A Horizon ETF)

HL   hecla.com Producing silver in Coeur d'Alene Idaho

HSLV.to   highlandersilver.com   Silver in Peru

JAG.to (JAGGF) jaguarmining.com Producing gold in Brazil

K.to KGC kinross.com   Producing gold at 6 active mines in safe areas

KUYA.ca (KUYAF) kuyasilver.com Silver in Peru and Northern Ontario

LIO.v (LOMLF) liononemetals.com   Gold in Fiji

LN.to (LONCF) loncor.com Gold explorer in DRC

MAE.v maritimeresourcescorp.com Gold in Newfoundland and Labrador

MAU.v (MAUTF) gold in Cote d'Ivoire montagegold.com

MGM.v   Maple Gold Mines.   Gold in the Abitibi region of Quebec.

MNT.to Gold trust at Royal Canadian Mint

NEXG.v (NXGCF) nexgold.com   The company is working on final permits to operate a gold mine in Northern Ontario.

NFG.v (NFGC) newfoudlandgold.ca   Discovering gold in Newfoundland.   Eric Sprott is a shareholder.

NGD.to (NGD) newgold.com Producing gold in ON, BC and a minor asset in Mexico

NUAG.to NEWP newpacificmetals.com Silver in Bolivia

NXE.to (NXE) nexgenenergy.ca   Uranium in Sask.

OMG.v (OMGGF) omaigoldmines.com Gold in Guyana

OR.to (OR) osisko.gr.com Gold royalties

PSLV.to   (PSLV)   Sprott's silver trust.

QIM.ca (QIMGF) quimbayagold.com   Gold in Colombia

QQD.to   A Horizon ETF that shorts the NASDAQ with leverage

RUP.to (RUPRF) rupertresources.com Producing gold in Finland

RVG.V (RVLGF) revival-gold.com Gold in Utah, and Idaho

SGD.v (SNWGF) snowlinegold.com Gold in the Yukon

SILJ   ETF of junior silver explorers

SSL.to (SAND) sandstormgold.com Hundreds of royalties

TCW.to (TOLWF) tricanwellservice.com Largest fracking company in W/Canada.
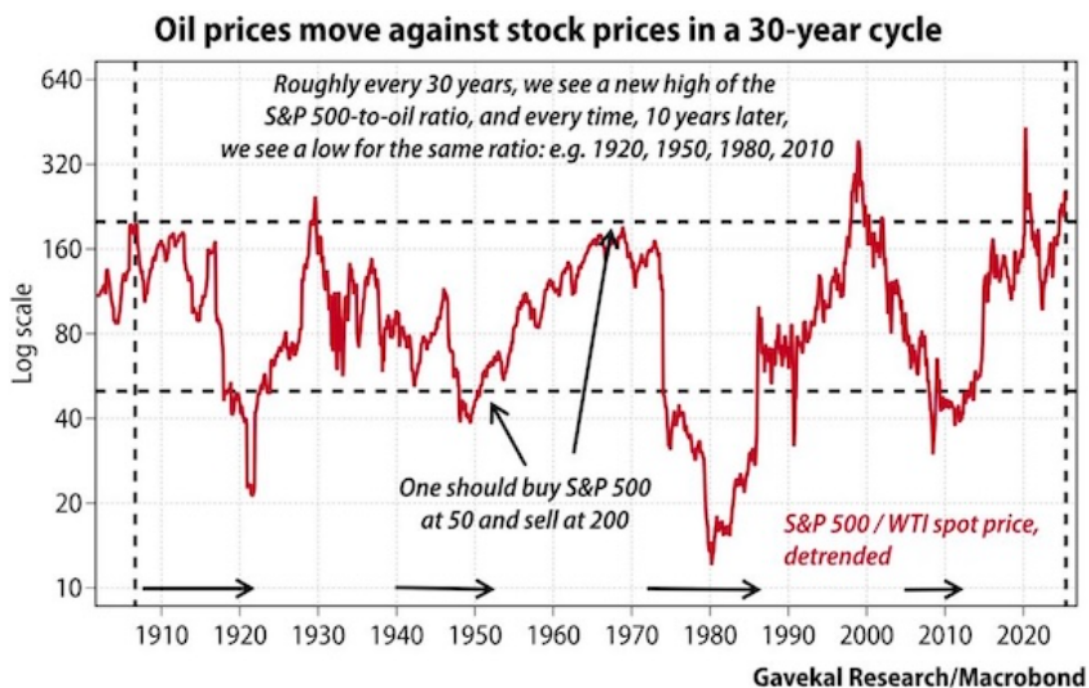
USA.to   (USAS)   Americas-gold.com   gold producer in Nevada

VOXR.to   VOXR   voxroyalty.com   60 active royalties spanning 6 jurisdictions.

WEAT   a Wheat fund that trades on the NYSE

WGO.v (WHGOF) whitegoldcorp.ca   Gold and Copper in the Yukon.

Please do your own due diligence. I am NOT responsible for your trading decisions.

Oil prices move against stock prices in a 30-year cycle

Roughly every 30 years, we see a new high of the S&P 500-to-oil ratio, and every time, 10 years later, we see a low for the same ratio: e.g. 1920, 1950, 1980, 2010

One should buy S&P 500 at 50 and sell at 200

S&P 500 / WTI spot price, detrended

Gavekal Research/Macrobond

This chart courtesy sources listed.

=== >>> The following sectors will be featured upon request - subject to our schedule: We can produce those the day before we prepare the report and thus save ourselves some time the day we work on the report.

Oil producers and Oil
Gas producers and Natgas
Copper
Uranium
Grains
Palladium
Platinum
Coal Index
US Dollar Index.
Base Metal Index
Gold in Canadian Dollars
Gold in Euros
If you are one of our supporters (explained at the top of this report), don't hesitate to ask, and we'll add the chart of your choice to our next report.

=== >>> Explanation of terminology used: SIs = Supporting Indicators; MAs = Moving Averages; GDI = Gold Direction Indicator (consisting of 10 components that can rise up to a potential 100%, or drop to 0); ARAT = Advancing Right Angled Triangle.   ATH = All-Time High

=== >>> Food for Thought is next.

2025-07-01, 7:46 p.m.

=== >>> Food for Thought

It is written, "Man shall not live by bread alone, but by every word of God."

— Luke 4:4

The Bible is the greatest book in the world.

In the midst of the many marvelous texts that make up the Scriptures, there are some verses that are often overlooked and seldom quoted compared to other well-known verses. These verses lie nestled away like timid little flowers. However, these timid little flowers give off a marvelous fragrance—a fragrance that, if inhaled deeply, can utterly transform your life. Sometimes I like to pick one such little flower from the pages of Holy Writ, lift it up, analyze it, and sense its fragrance and its transforming power.

Psychologist William James once stated: "The Bible contains more true sublimity, more exquisite beauty, more morality, more important history, and finer strains of poetry and eloquence than can be collected from all other books, in whatever age or language they may have been written." Sir William Gladstone, considered by many the greatest prime minister England ever had, said, "I have known 95 great men of the world in my time. And of these, 87 were followers of the Bible."

Courtesy: crm.tv

== >>> Peter and Carol find watching Pastor-Teacher David Jeremiah a great way to build spiritual growth. We watch his program on Sunday evening. For times and stations visit his website at   davidjeremiah.org, or you can watch programs from his archives.

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