



Jim Mellon in Conversation with Victor Hill

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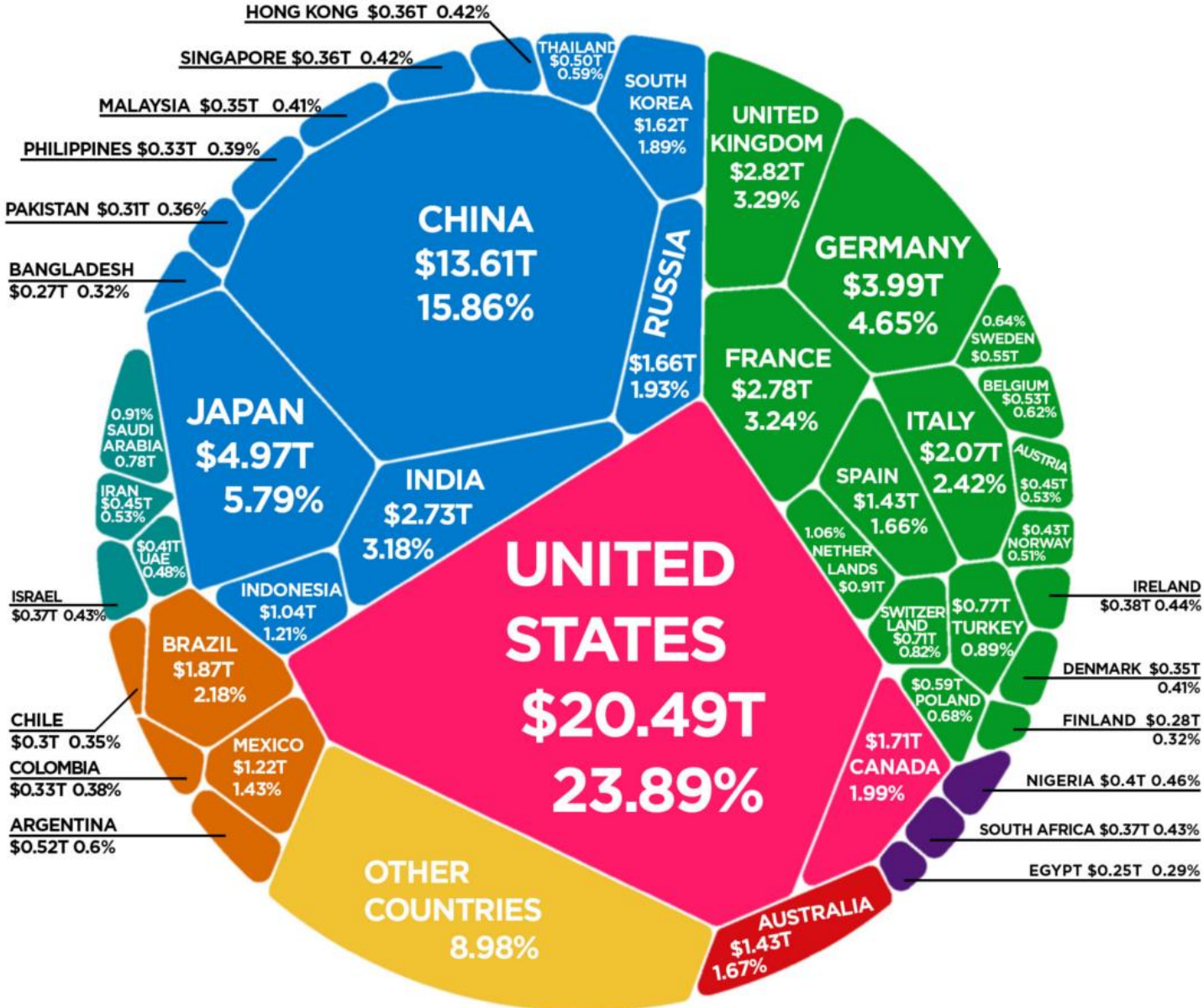
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GDP of Economies

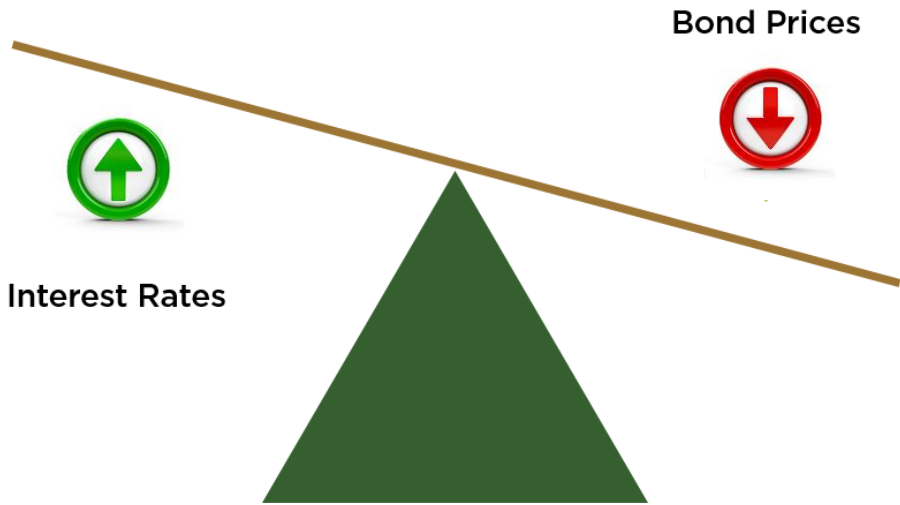


World control
economist intermediate contribute
specific global needed geography ways
European conditions (disambiguation), mercantilism
production, anthropology recorded produce degree.)
Gross distribution agriculture supply property Babylonians
sector process services related society GDP
defined (economic called management started main
word economy modern manufacturing, term various
tertiary science contrasted
natural stage/degree
free use times
economy: aspects applied
industrial needed
distribution,
national activity
economy
developed
included unit
economic
informal
resource
administrative education

Global Economy

exchange
revolution trade
social history
state measures
value financial
consumption private
demand general world.
concerned categories

Last 2 Years on Target



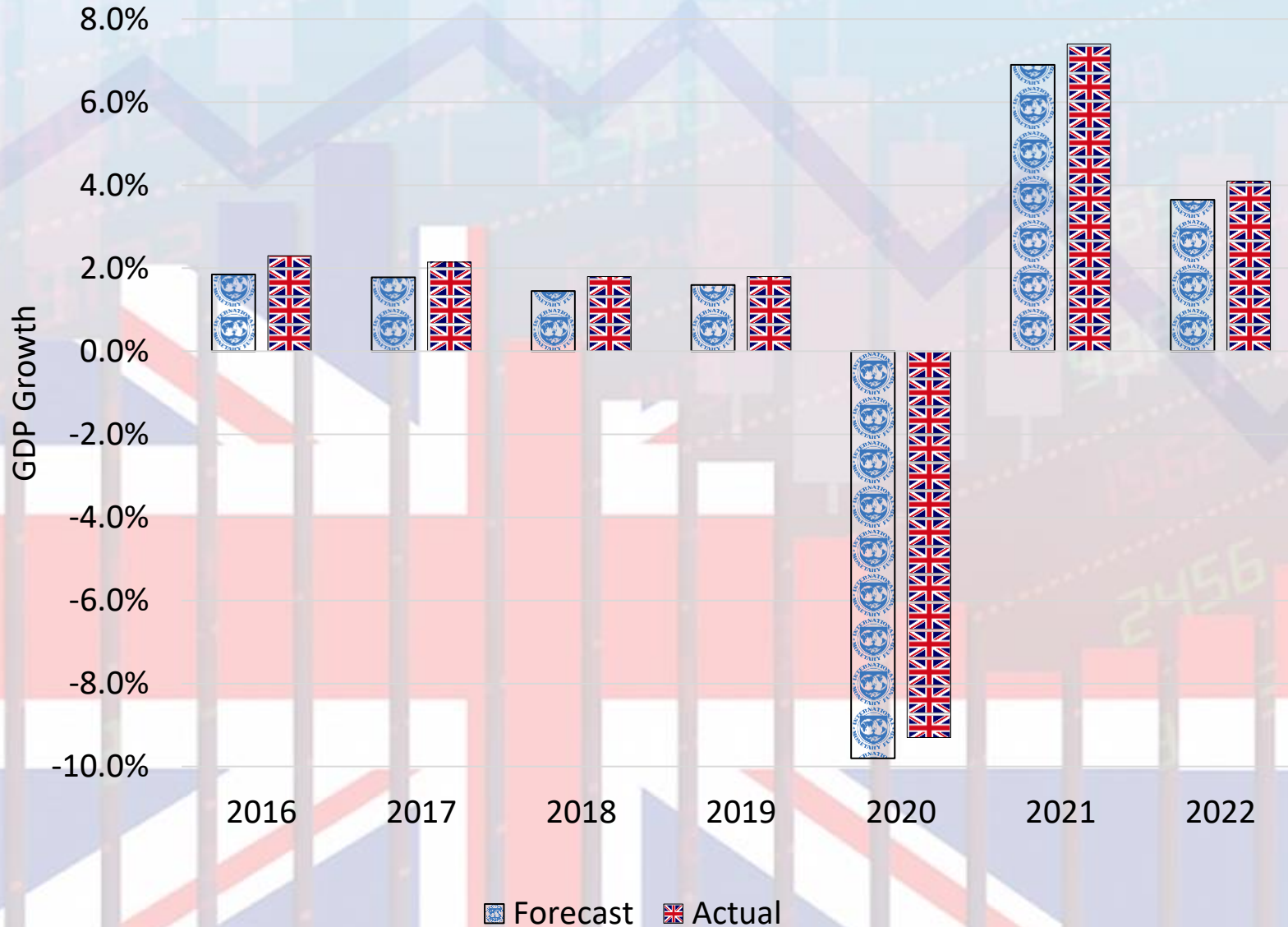
4% GDP Growth



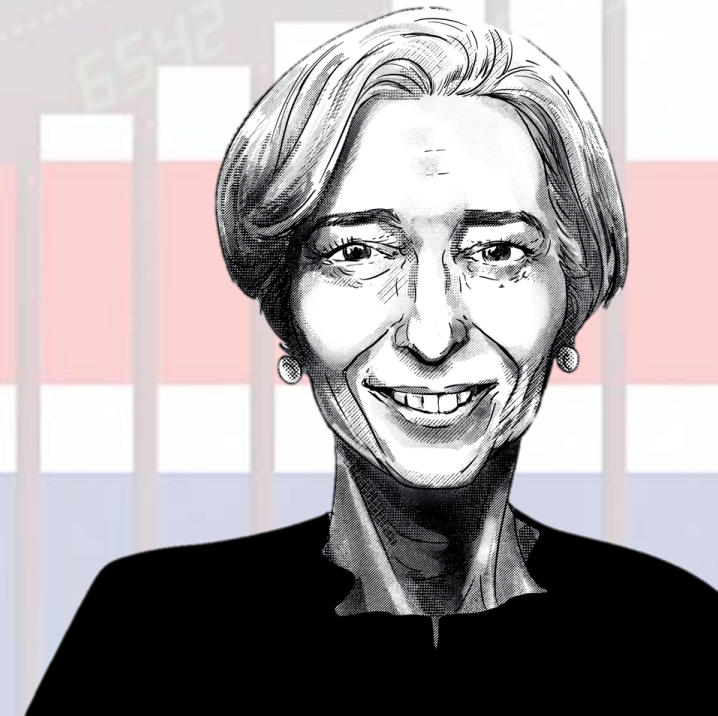
2022

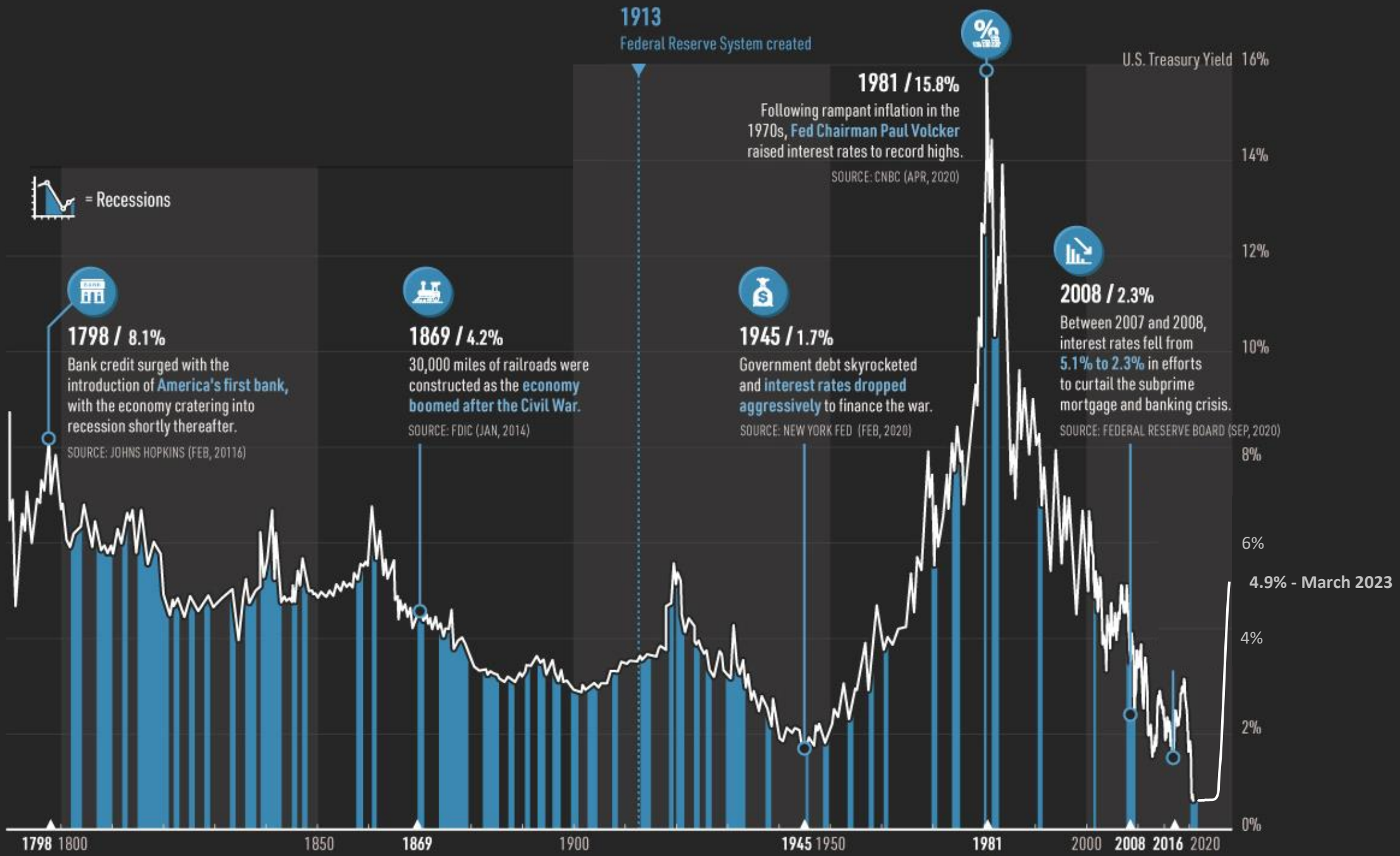


IMF Consistently Pessimistic About UK



“Forecasting GDP growth is easy, but getting it right is the hard part”





SOURCE: GOLDMAN SACHS GLOBAL INVESTMENT RESEARCH VIA ISABELNET (MAY, 2019), FEDERAL RESERVE BOARD (SEP, 2020), NBER (JULY, 2020), NBER (1986), NBER (1926)



US Inflation – How much have prices increased?

Food at elementary and secondary schools

+254.1%



Fuel oil

+65.7%



Eggs

+49.1%



Airline fares

+36.0%



Butter and margarine

+34.2%



Flour and prepared flour mixes

+24.9%



Public transportation

+23.8%



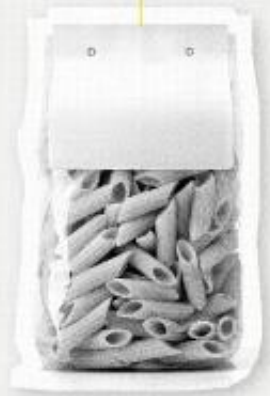
Fats and oils

+21.8%



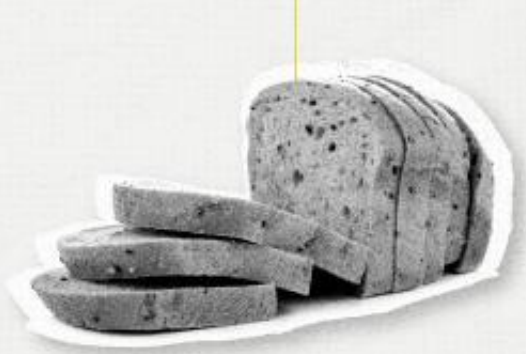
Rice, pasta, cornmeal

+16.8%

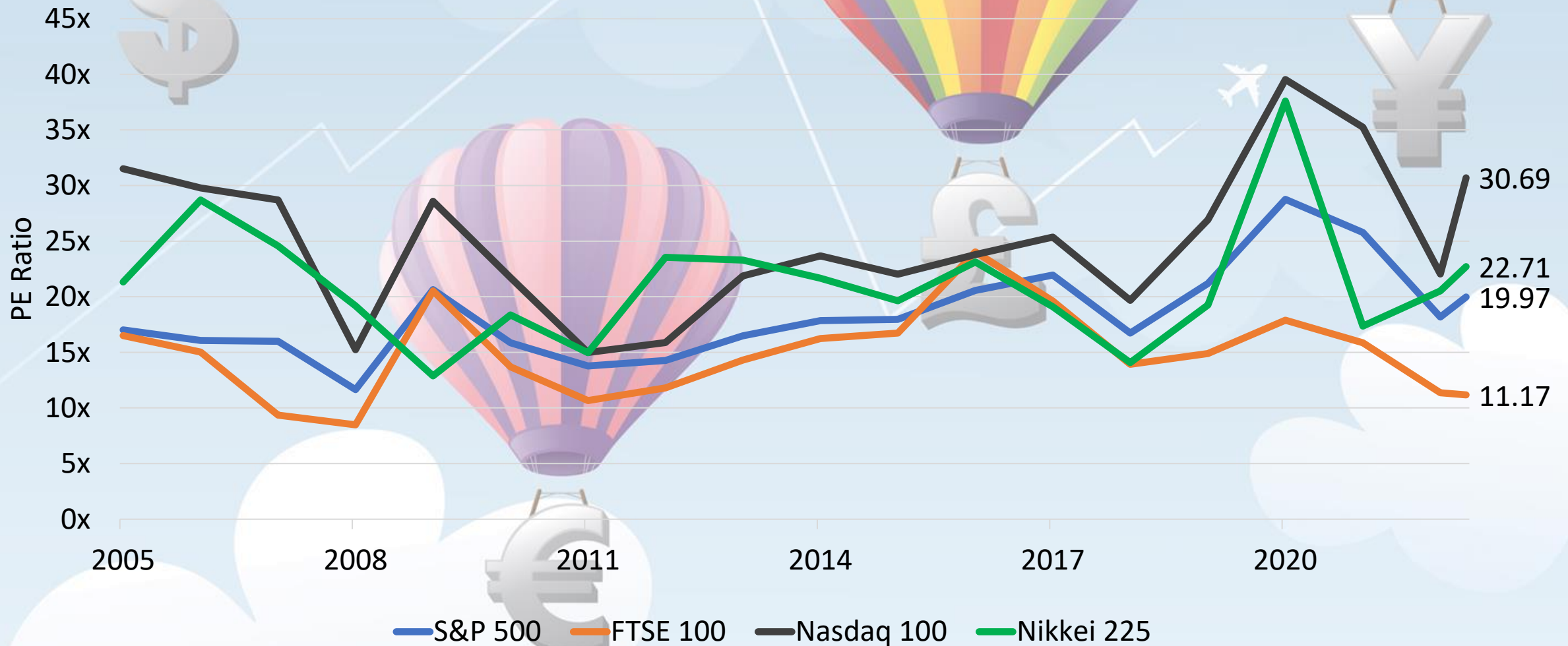


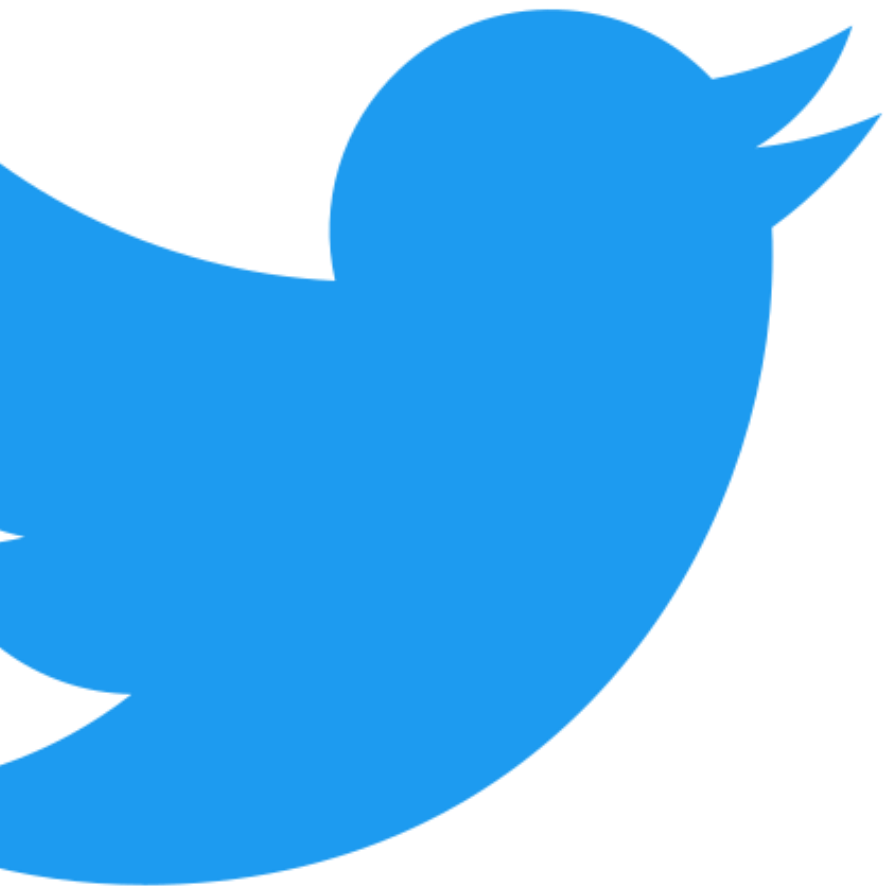
Bread

+15.7%



PE Ratios of Major Stock Indices





Benedict Evans 

@benedictevans

Congratulations to Credit Suisse on their \$3bn exit. People think of startups as an overnight success, but they'd been grinding away since 1856. Sometimes you have to ignore the noise and stick to your vision.

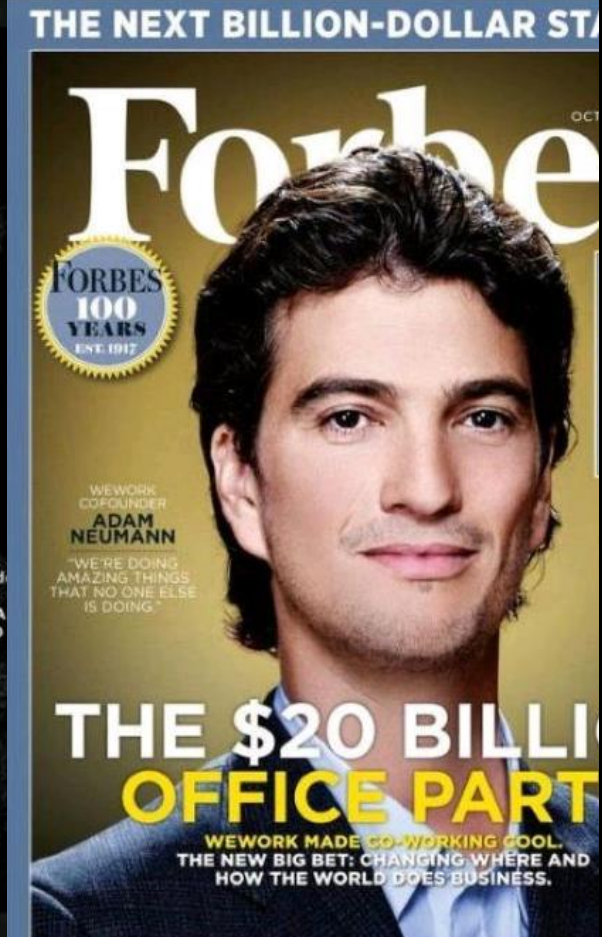
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4,635



71



Proud to be on @Forbes' annual ranking of America's Best Banks for the 5th straight year and to have also been named to the publication's inaugural Financial All-Stars list.

bit.ly/3ZFxwyp





Invention and Adoption is a Slow Process

Oto Frederick Rohwedder



Sliced Bread
30,000 years!



Steering Wheel
8 years after the first car



Can Opener
48 years after the first can

Evolving Technologies are Connected



Quantum computers will accelerate timelines for longevity, nuclear fusion and cellular agriculture

Nuclear fusion will significantly reduce input costs for cellular agriculture

Quantum Computing & AI

Nuclear Fusion

Longevity

Cellular Agriculture

Cellular agriculture can improve quality of our diets, linked to longevity

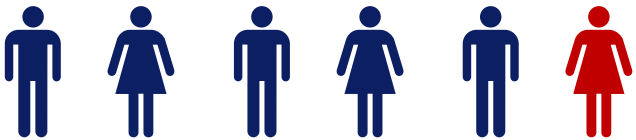
The Silver Tsunami



2019



2050



The UN estimates that by 2050:
1 in 6 people will be over age 65 (**16%**)
up from **1 in 11** (**9%**) in 2019;



2050

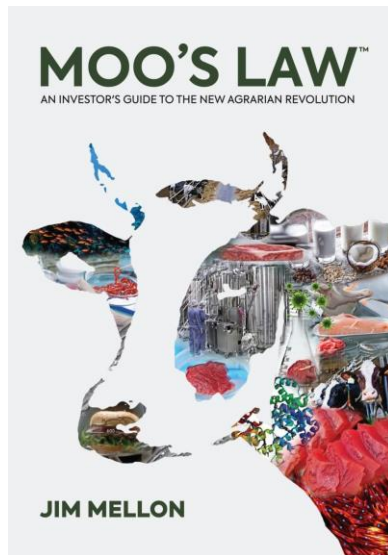


In Europe and North America,
it will be **1 in 4** by 2050.

Moo's Law – Then and Now

Large amounts of capital beginning to flow into a rapidly expanding industry

2020



- Moo's Law release
- 95 cellular agriculture companies globally
- \$0.65 billion invested

Today



- Over 300 cellular agriculture companies globally
- \$6.46 billion invested
- Transition from R&D to commercialisation

SUNDAY 2 APRIL

FTWeekend
OXFORD
LITERARY
FESTIVAL



Jim Mellon Juno's Ark

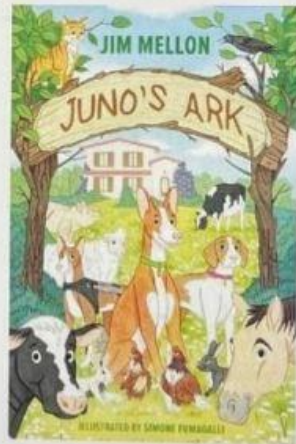
2pm / Lincoln College: Oakeshott Room / £8

Investor and entrepreneur Jim Mellon talks about his first children's book, *Juno's Ark*, inspired by his rescue of a Podencos, a breed of Spanish hunting dog.

The story follows a big-hearted dog Juno. A bedraggled chicken arrives in Juno's house one day. Juno cannot rest until all the chickens are safe. But mistreated chickens lead to mistreated cows and unhappy pigs and Juno and her friends find themselves helping to bring a whole load of animals to safety. Where will she put them all?

Mellon is a well-known investor and author of bestselling books including *Wake Up!*, *Juvenescence* and *Moo's Law*. He is also passionate about animal welfare. He is donating 50% of the proceeds from *Juno's Ark* to Danos Una Oportunidad (DUO), a dog shelter in Ibiza, and the other 50% to Compassion in World Farming.

Age 7-9



Supporting



COMPASSION
in world farming
cwi.org

Juno's Ark

Real life Juno!



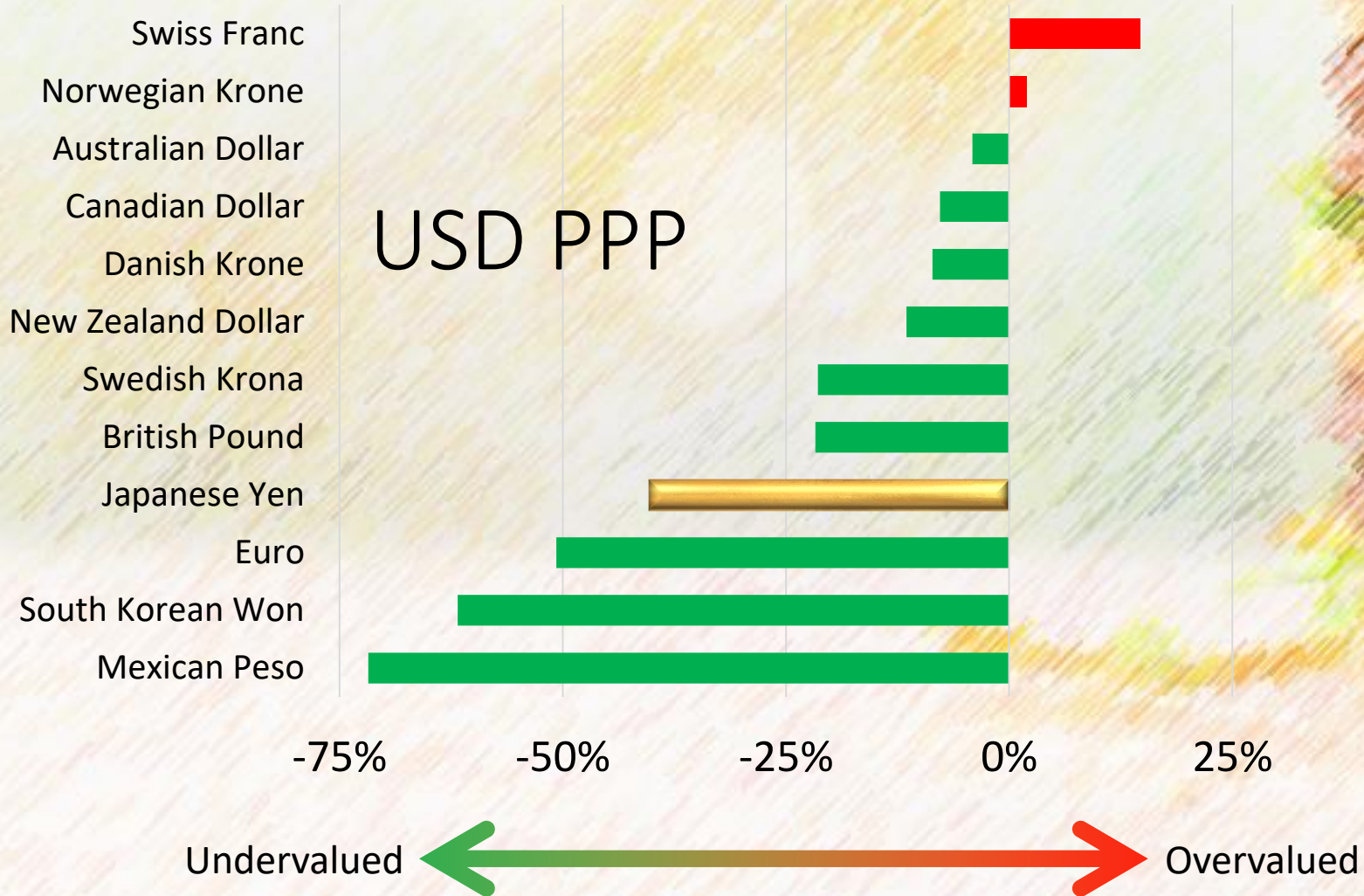


20%



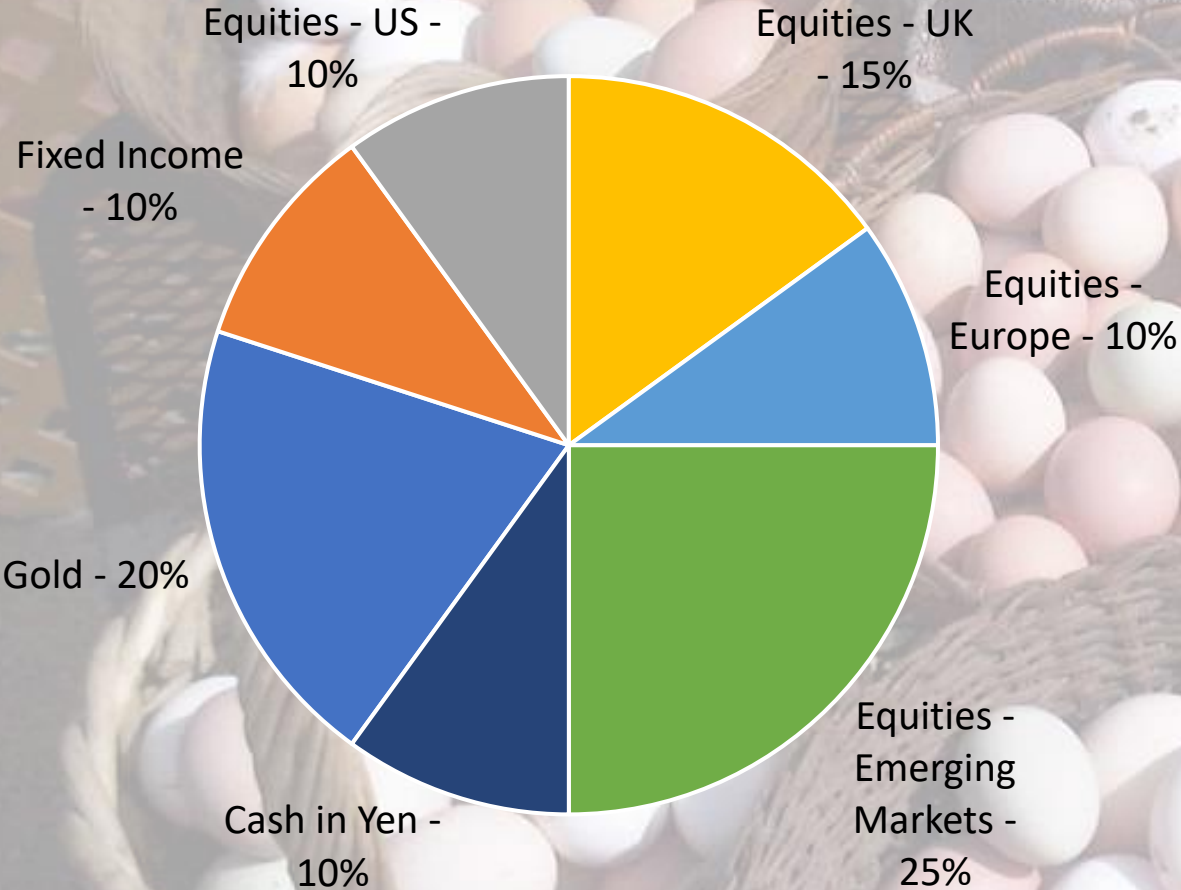


is the best buy

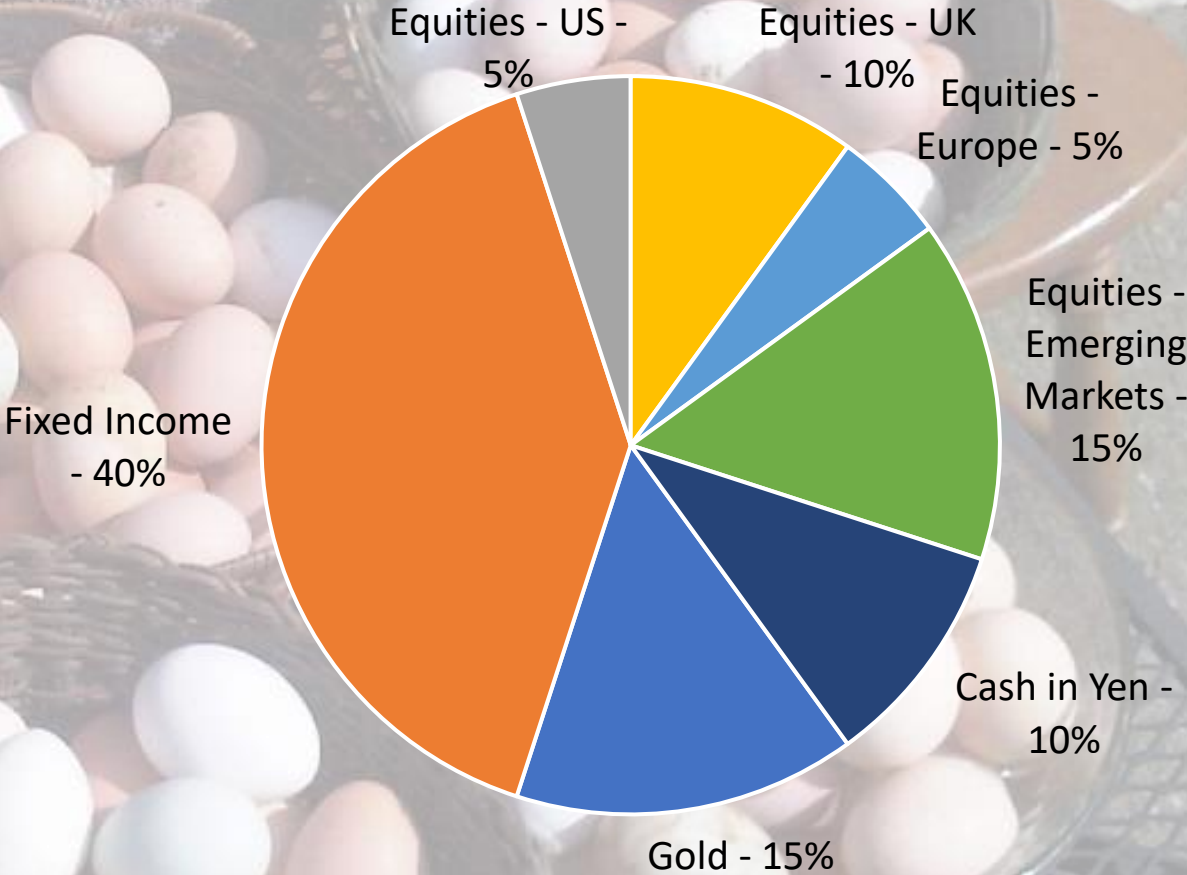


Portfolio Allocation

Aggressive



Conservative

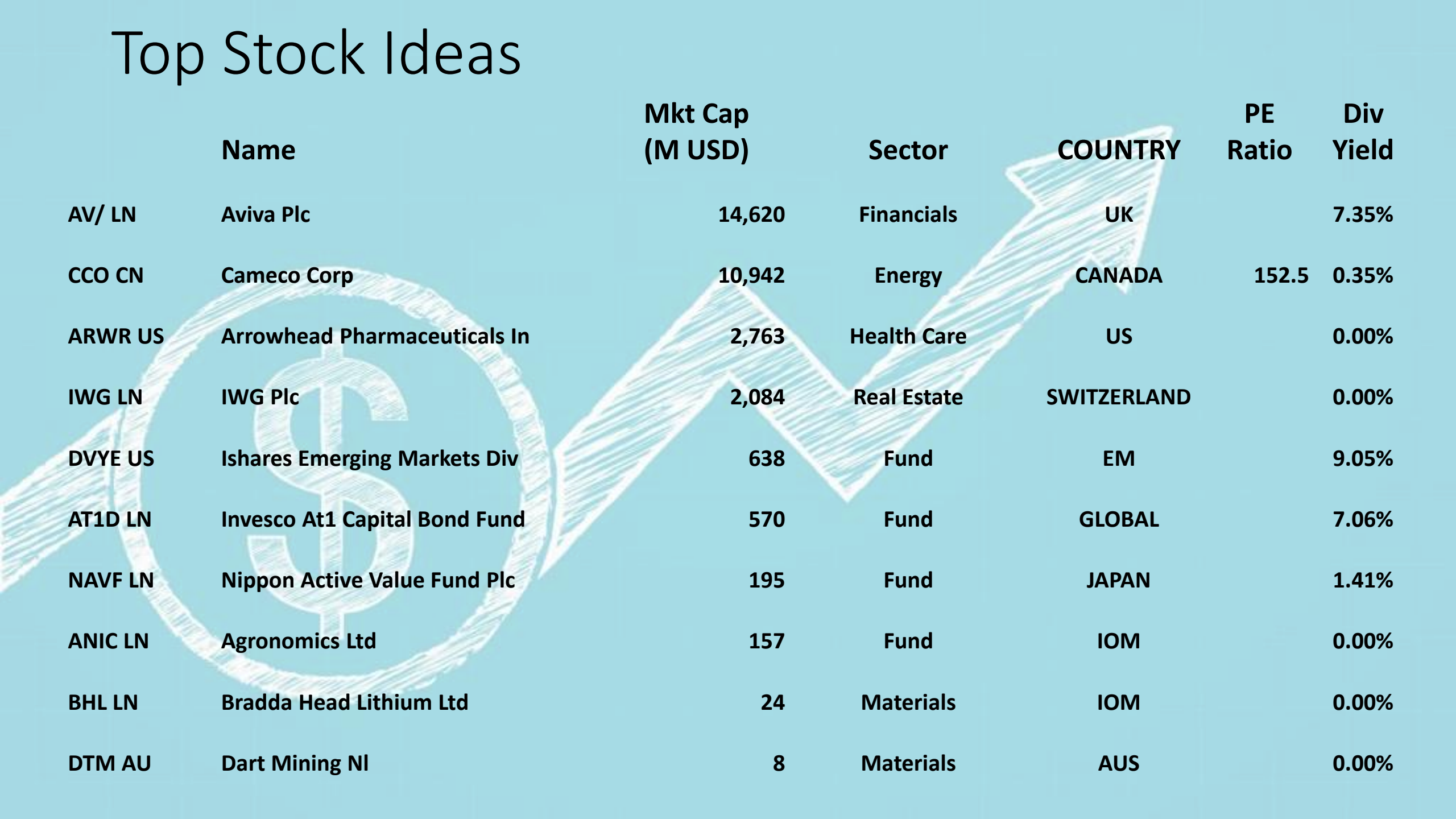


Top Stock Ideas



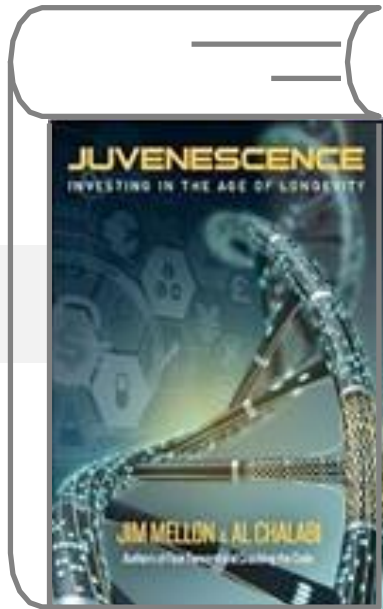
	Name	Mkt Cap (M USD)	Sector	COUNTRY	PE Ratio	Div Yield
2318 HK	Ping An Insurance Group Co-h	121,269	Financials	CHINA	10.7	5.35%
6758 JP	Sony Group Corp	112,267	Consumer Discretionary	JAPAN	15.9	0.63%
MBG GY	Mercedes-benz Group Ag	80,074	Consumer Discretionary	GERMANY	5.1	7.29%
GLEN LN	Glencore Plc	73,228	Materials	SWITZERLAND	3.5	6.57%
FCX US	Freeport-mcmoran Inc	57,414	Materials	US	16.8	1.50%
PRU LN	Prudential Plc	39,006	Financials	UK	31.3	1.35%
BARC LN	Barclays Plc	29,658	Financials	UK	5.0	4.75%
EMIRATES UH	Emirates Nbd Pjsc	22,876	Financials	UAE	6.3	4.51%
TECK US	TECK Resources Ltd	22,850	Natural Resources	US	7.76	0.83%
RPRX US	Royalty Pharma Plc- Cl A	22,048	Health Care	US	93.9	2.12%

Top Stock Ideas

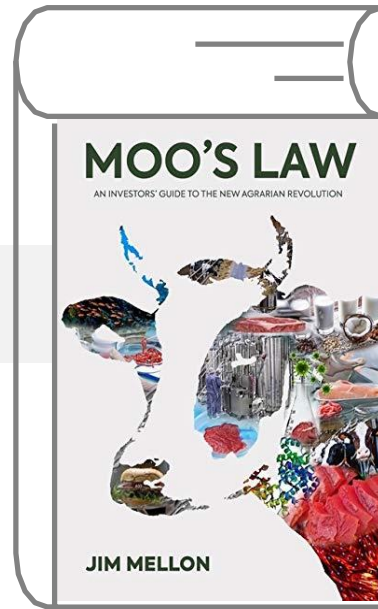


	Name	Mkt Cap (M USD)	Sector	COUNTRY	PE Ratio	Div Yield
AV/ LN	Aviva Plc	14,620	Financials	UK		7.35%
CCO CN	Cameco Corp	10,942	Energy	CANADA	152.5	0.35%
ARWR US	Arrowhead Pharmaceuticals In	2,763	Health Care	US		0.00%
IWG LN	IWG Plc	2,084	Real Estate	SWITZERLAND		0.00%
DVYE US	Ishares Emerging Markets Div	638	Fund	EM		9.05%
AT1D LN	Invesco At1 Capital Bond Fund	570	Fund	GLOBAL		7.06%
NAVF LN	Nippon Active Value Fund Plc	195	Fund	JAPAN		1.41%
ANIC LN	Agronomics Ltd	157	Fund	IOM		0.00%
BHL LN	Bradda Head Lithium Ltd	24	Materials	IOM		0.00%
DTM AU	Dart Mining NI	8	Materials	AUS		0.00%

2017



2020



2023



Coming soon..

