

March War Room: Cold War 2.0



As the Russia-Ukraine conflict continues, it is exposing significant cracks in the globalized economy. China and India continue to buy Russian oil, while Saudi Arabia could be close to pricing oil contracts in Yuan against long-standing U.S. commitments. Even good goals like supply-chain resilience or energy independence necessitate a world order reset (and higher prices).

- Is the Russia-Ukraine conflict priced into markets?
- Will China remain neutral?
- Is the world in a period of deglobalization?

Join us as we introduce a new scenario on the quickly de-globalizing economy, and consider the impact of a Russian bond default, in the next HiddenLevers War Room.