

From Chris Temple - Editor/Publisher

MONDAY MORNING -- August 29, 2022

Good Monday morning, Gordon,

This morning at 8:33 Eastern time, NASA's Artemis I rocket is slated to take off in a high-profile trial run in the agency's new moon mission. Minutes ago, the weather--which looked dicey last night--was looking more favorable; late summer storms, etc., seem as if they will remain at bay so Artemis can fly. (Although in another LATE breaking news item, an equipment issue or some such thing is now being looked at.)

I'm not at home now to watch in person, of course; but will be watching the television like most others.

In our own orbit (pun intended) there is some BIG space-related news out this morning where **Royal Helium** is concerned.

The company has [JUST ANNOUNCED](#) "...a long-term agreement with a major North American space launch company for the supply of helium."

As I understand it, this is *the first time ever* that a major supplier of helium has done a deal *directly with an end user*, rather than with one of the precious few helium/gas wholesalers in the world.

For those of you who have unfortunately been asleep on this one, [HERE](#) and [HERE](#) you can watch, respectively, my conversation with Royal's C.E.O. Andrew Davidson and a presentation at our SIIC-2022 by Manager of Corporate Development Dean Nawata from late this past spring.

Among the many elements of this unique story (more details will be coming related to construction, timelines, projected volumes and revenues, etc. only briefly alluded to this morning) is the fact that, as Davidson is quoted as saying, "Royal aims to be a leading, *greener source* of helium for the aerospace, high tech, medical, and manufacturing industries worldwide". (*Emphasis added*). **Unlike virtually every other significant resource of helium in the world, Royal's is *not* associated with hydrocarbon production and the like.**

And I suspect this aspect--together with the uber-safe jurisdiction of Saskatchewan particularly--were prime motivators for this particular end user to want to tie up helium supplies years into the future.

Quick market comment and coming added guidance/portfolio changes for Members:

Last week saw stark confirmation of my warnings RE: the dollar specifically (which hit *another* new 2022 high early this morning before pulling back as I write this) **and Jerome Powell's intentions *generally*.**

Members will imminently receive my latest regular issue recapping this and a LOT more, *together with particular guidance on what we'll be doing to modify or augment our recent, timely moves back into inverse ETFs.*

For the moment, we're standing pat as I watch *two* different factors I'll be discussing in that new Members-only issue, scheduled to go out by some time tomorrow.

All the best,

Chris Temple -- Editor/Publisher

**"You can get information anywhere...but here, you get
KNOWLEDGE!"**

**Don't forget that those of you so inclined can follow my thoughts,
focus and all pretty much *daily* !!!**


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