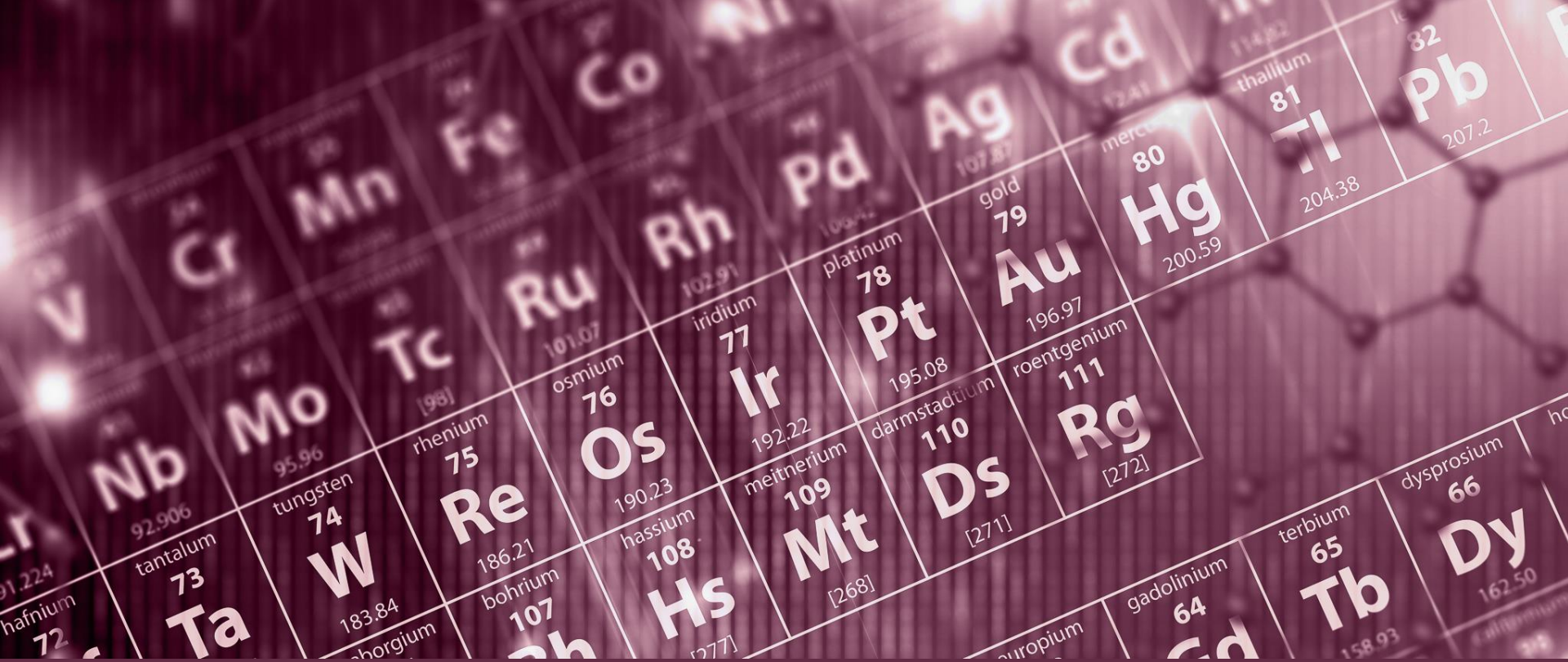




It's the Elements. It's their unique Properties.

Au Ag



is creating investor-friendly financial concepts
with a strong focus on
precious metals and green-tech-elements

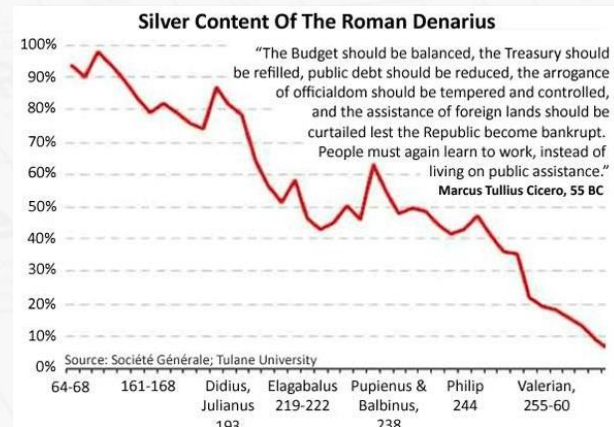


Currencies [Money]

“Gold [Au] is the only currency, along with Silver [Ag], that does not require a counterparty signature.

Credit instruments and fiat currency depend on the credit worthiness of a counterparty.”

Feb 2017, Alan Greenspan



Silvers multi-millennia history as money - did you know...

The French use the same word "argent" for silver and for money.

Even the British pound, one of the world's most stable currencies, has its origins in the fact that it was once backed by silver.

Indeed the British pound got its name because it once represented a pound of silver.

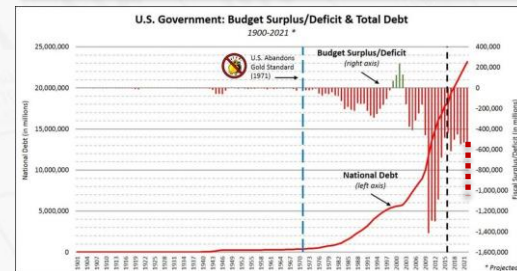
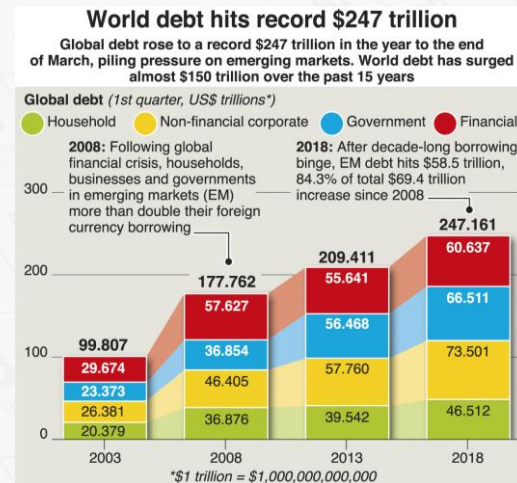
Today, a pound of silver is worth well over 200 British paper pounds. The pound, which the Bank of England claims is a store of value, has lost more than 99.5% of its value (the British pound is one of the world's oldest and most stable currencies).

The Case

- Skulderna ökar

Stat, Företag, Privatpersoner

Centralbankernas agerande



The Case

- Silver är den näst mest använda råvaran
 Bästa värme & el-ledande ämnet på jorden
 Datorer, mobiler, Green-Tech
 Bakteriedödande
 Vattenrening, Sjukvård



The Case

- Managed COMEX > Once in a life time spring force

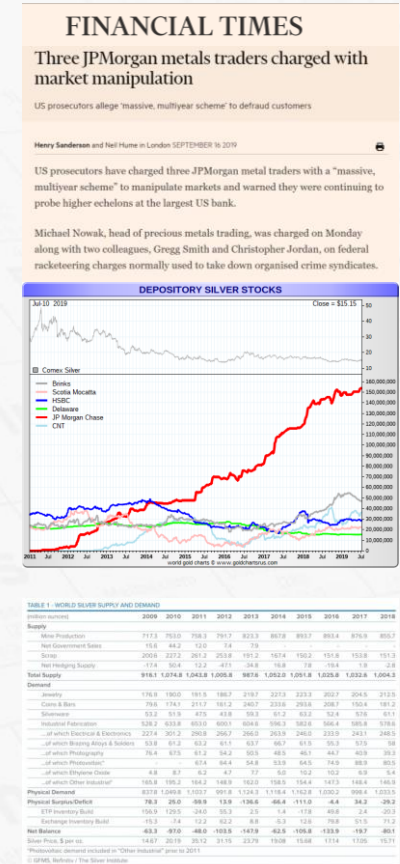
Double cross > Short squeeze

- Demand/Supply

Mer än 10 års underskott

Inga reserver kvar längre [även CB]

Supply/Demand ca 1 000 million t.oz.





The Case

- Tight COMEX-turnover > physical shortage < Just-in-time

Mycket låg priselasticitet

Begränsat antal "primary" Silverproducenter

- Dagens prisrelation till Guld 1:80

Silvertoppar under 1:40

Förekomst 1:16





The Case

- Silver 2020-01 [17,5] har 180% till ATH [50]

Bör nå dubbla i kommande cykel [100+]

Gruvbolagen normalt 2-3 ggr utvecklingen för råvaran

Bolagen idag: Lean & Mean

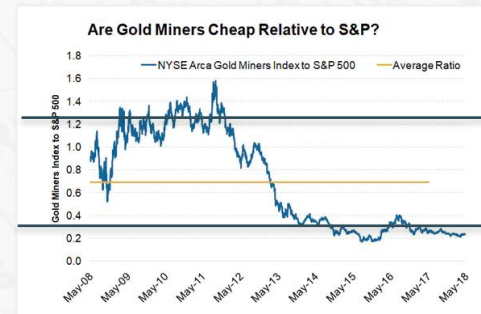
Hög M&A aktivitet

The Case

- Kontracykliskt "normala börsen"

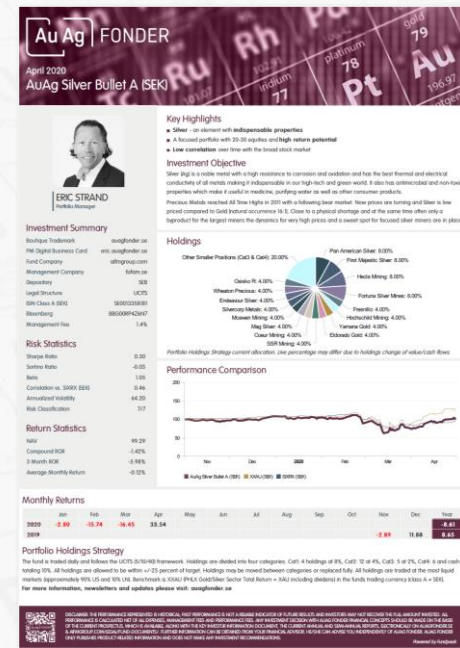
Låg korrelation över tid 0,3

Rotation med stora börs/obligationsvärden



AuAg Silver Bullet

- Gruvbolag - Silver & Guld
 - Long-Only, min 90%
 - Fokuserad portfölj: 27 innehav
- Aktieurval
 - Likviditet i handel
 - Fokus - Silver kontra Guld
 - Jurisdiktion
 - Ledning
 - Momentum & Undervärderat





AuAg Silver Bullet

- Sverige kanske mest riskfyllda fond

Daglighandlad UCITS [A, SEK][B, EUR]

Enda Silvergruvbolagsfonden i Europa

[BlackRock BGF World Gold, 50 miljarder kronor]

- Likvida innehav på US & LN

Dollarpåverkan - men liten relativt volatiliteten

Förvaltningsavgift 1,4% [Låg TA 1,45-1,55%]



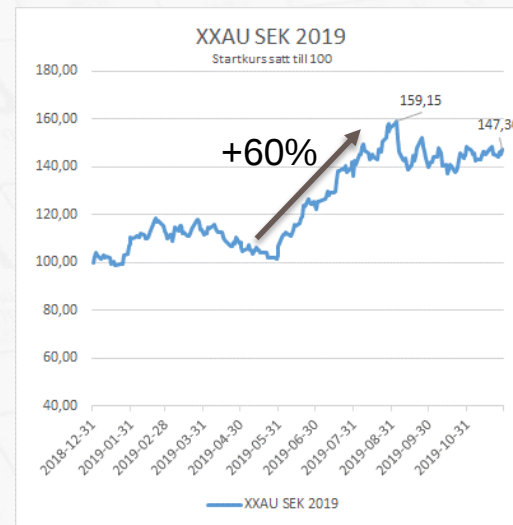
Marknaden

- Jämförelseindex XXAU i SEK [XAU utdelande]

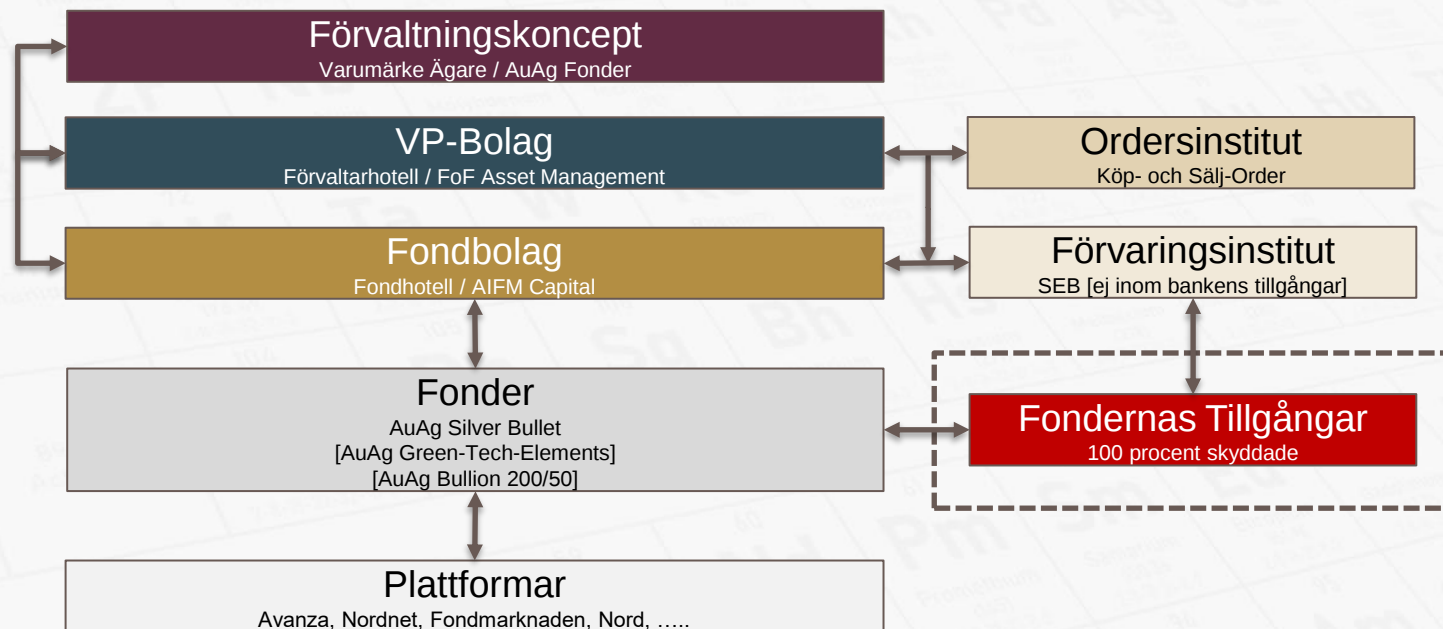
- Blixtsnabba uppgångar

Risk att bli kvar på stationen

”Secular Bull market” start juni 2019



Ägande av Tillgångar, 100 procent skyddade





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