



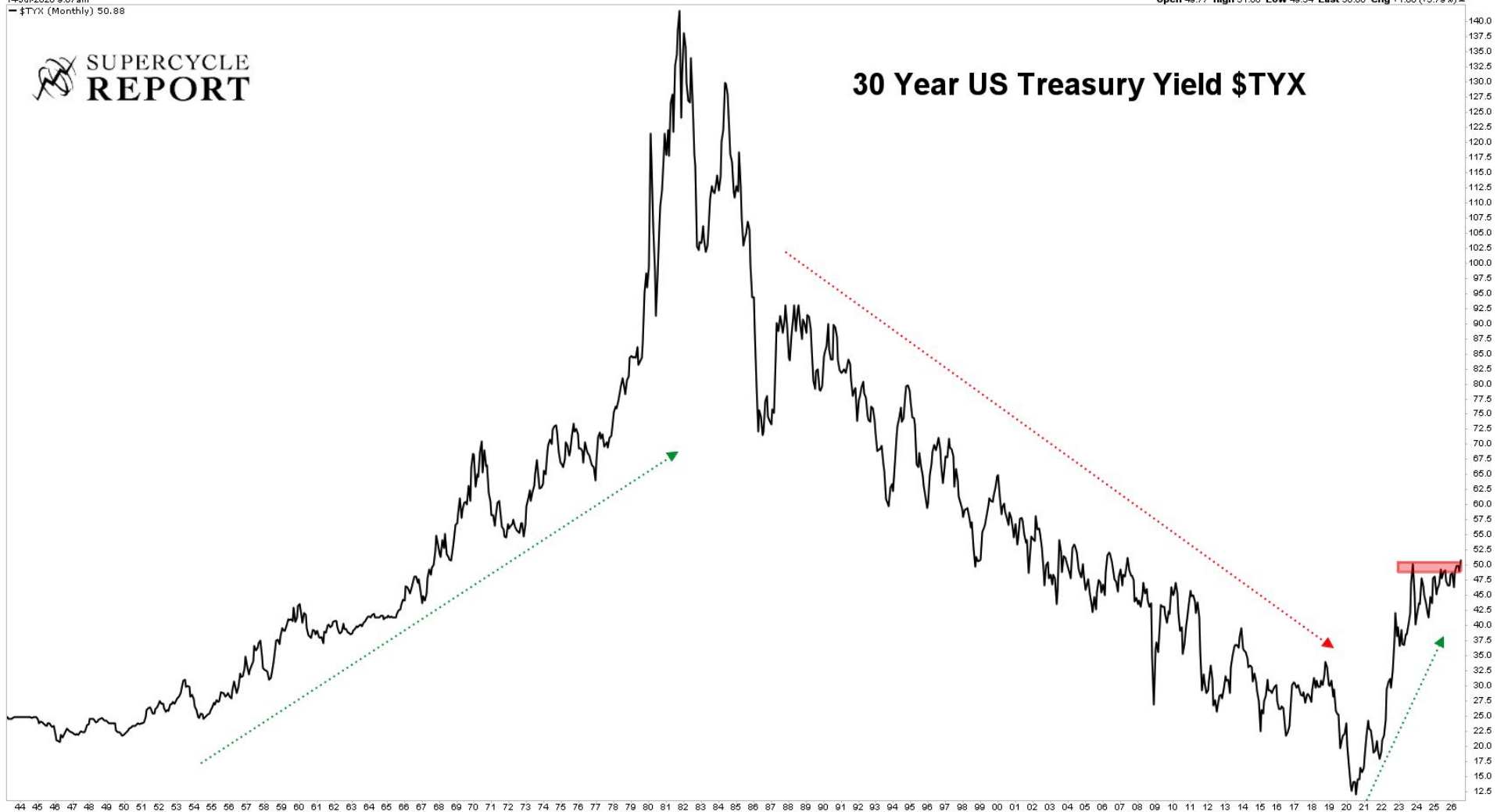
SUPERCYCLE REPORT

With Jason Perz and Sam Gatlin



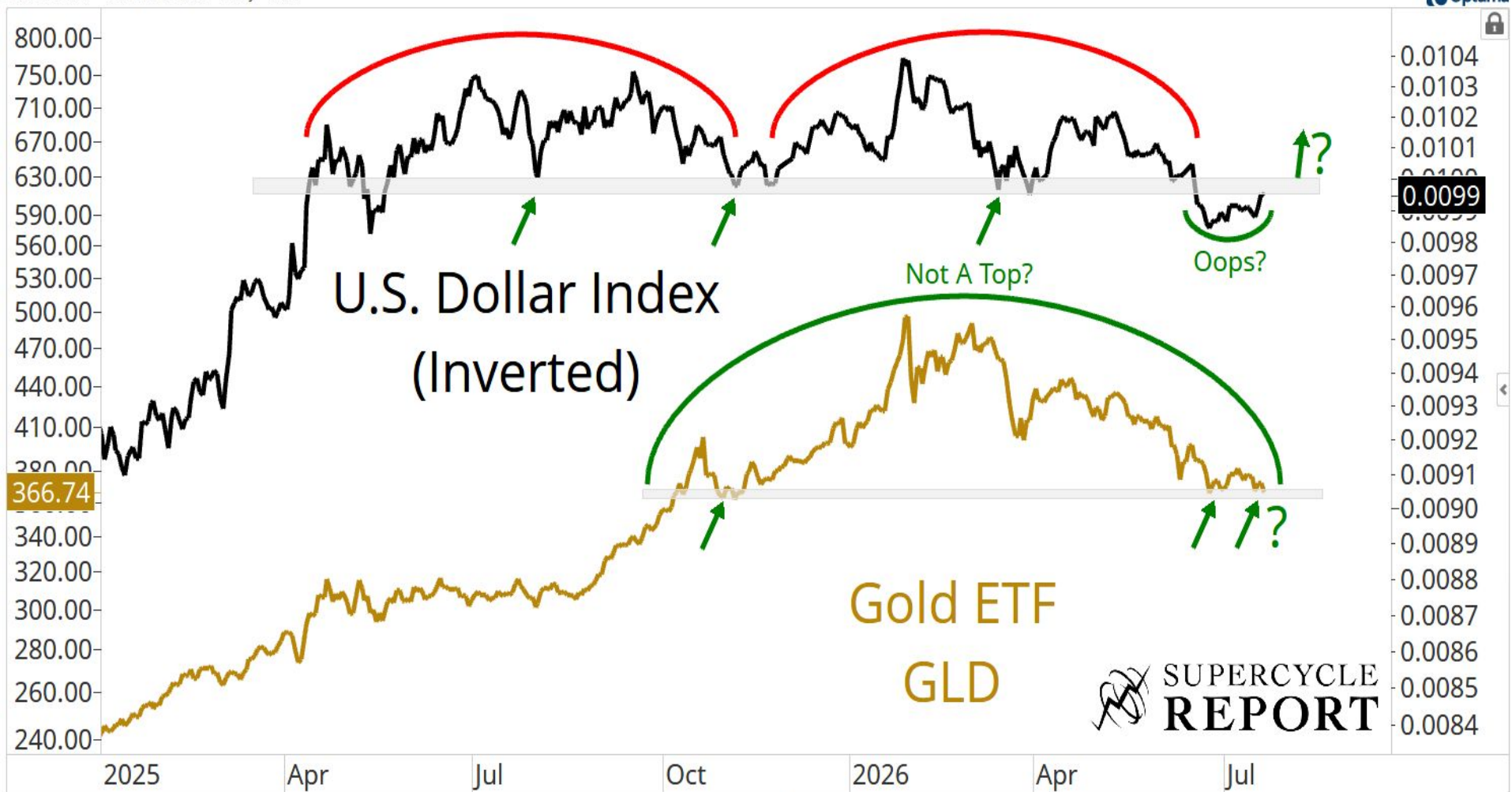


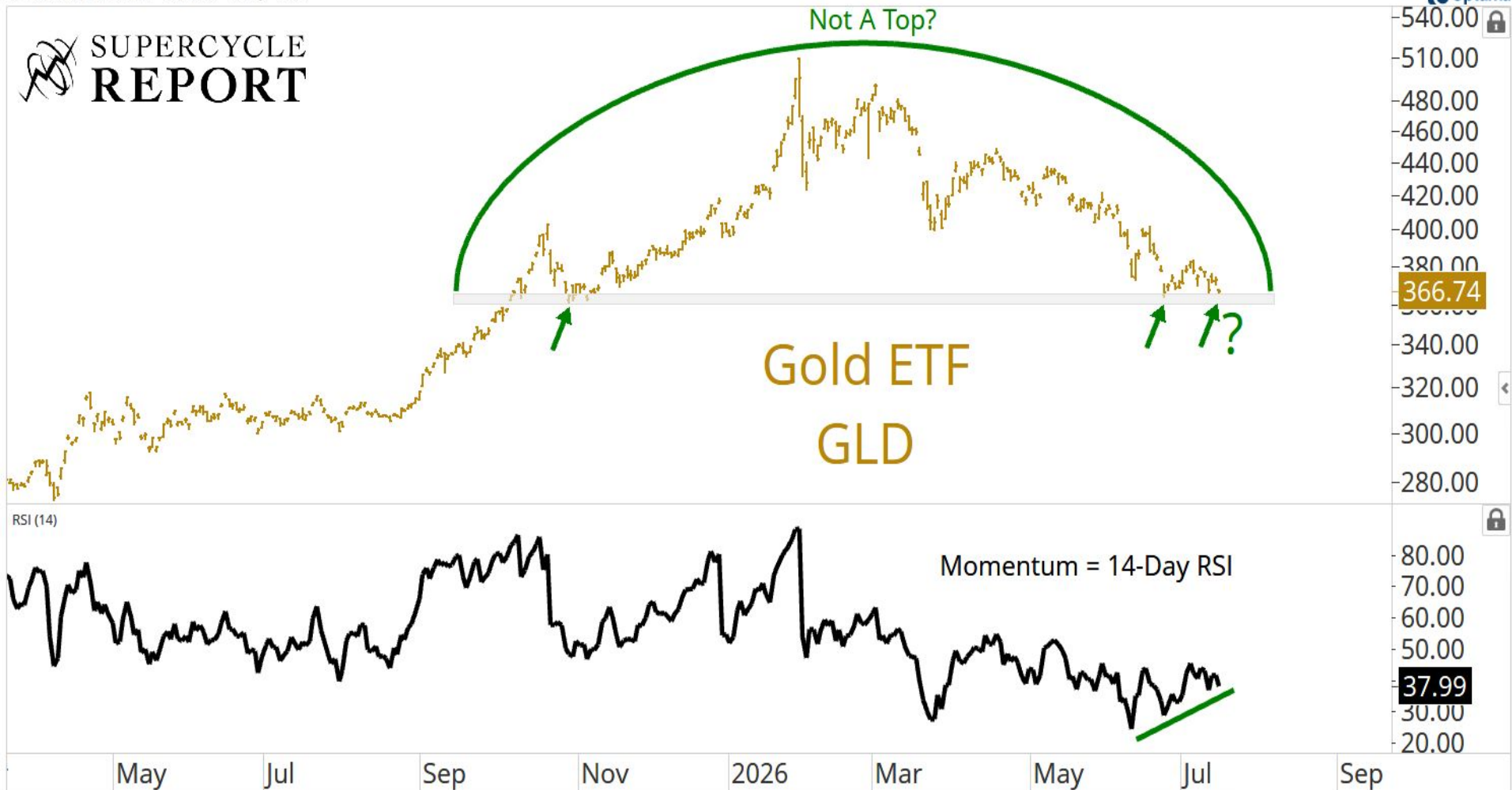
30 Year US Treasury Yield \$TYX



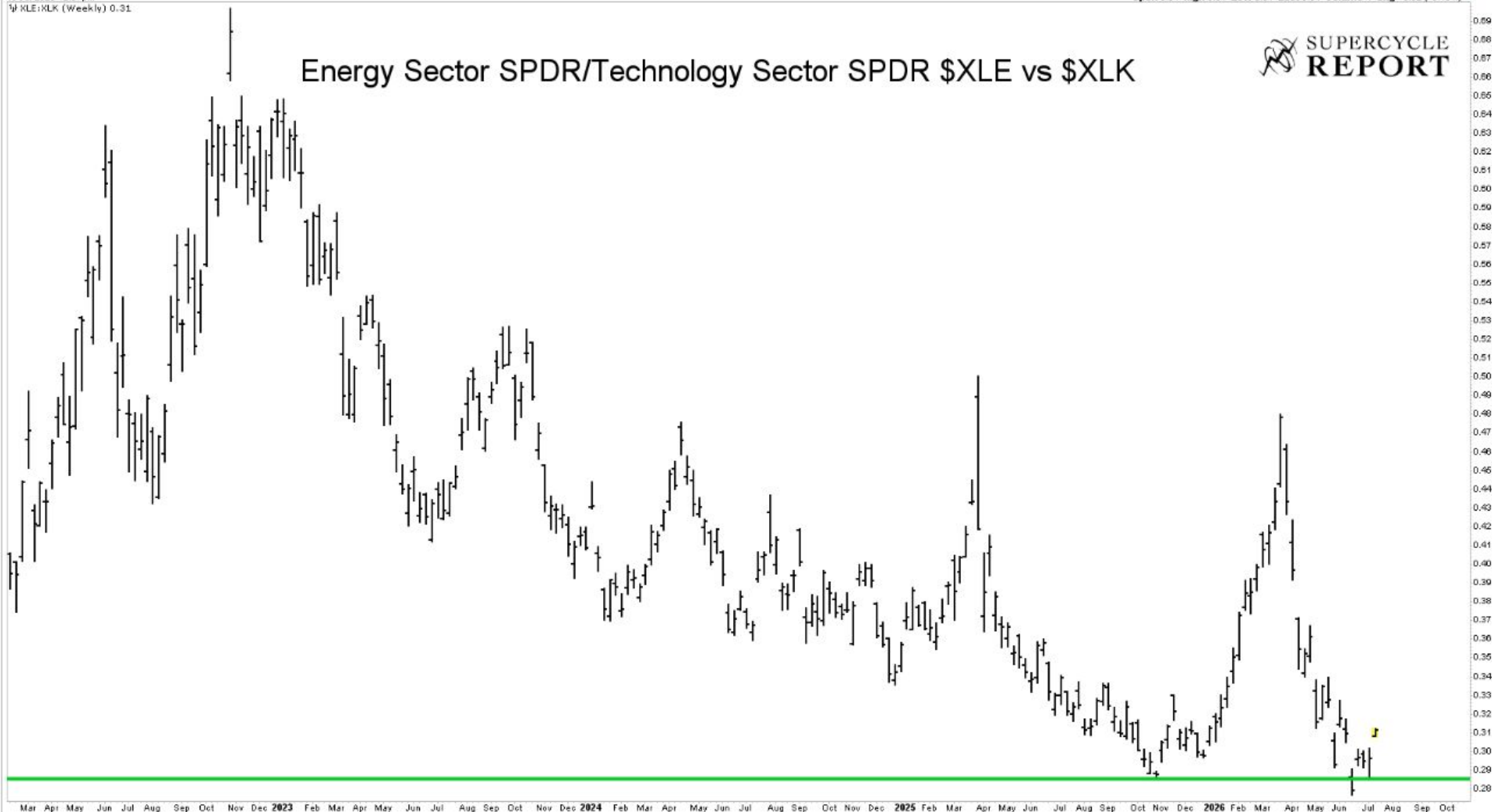
U.S. Dollar Index · 1W · TVC 100.580 -0.385 (-0.38%)





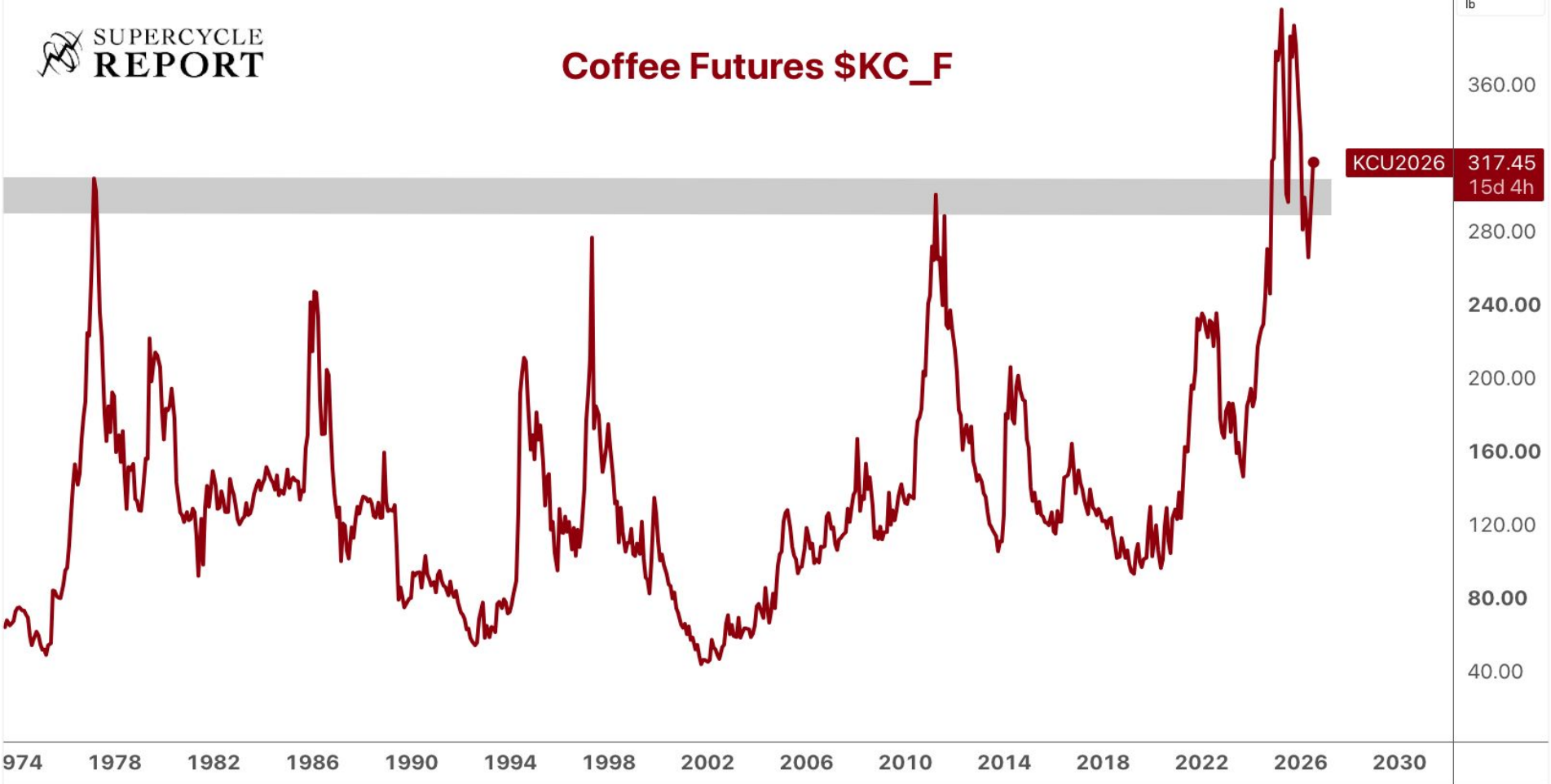


Energy Sector SPDR/Technology Sector SPDR \$XLE vs \$XLK





Coffee Futures \$KC_F

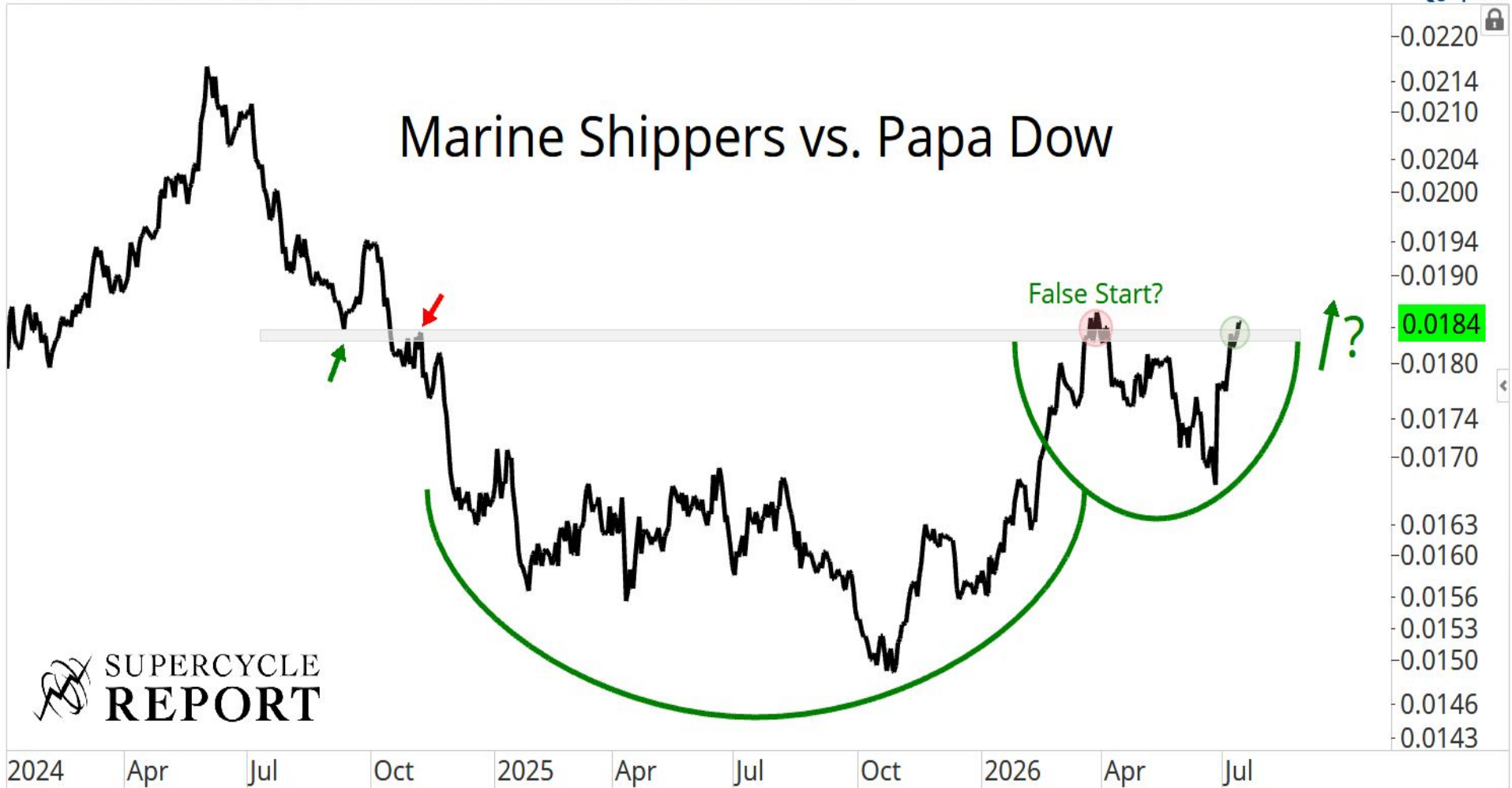


KCU2026 317.45
15d 4h



Global Shipping ETF \$BOAT





Breakwave Tanker Shipping ETF BWET

All-Time High

230.03

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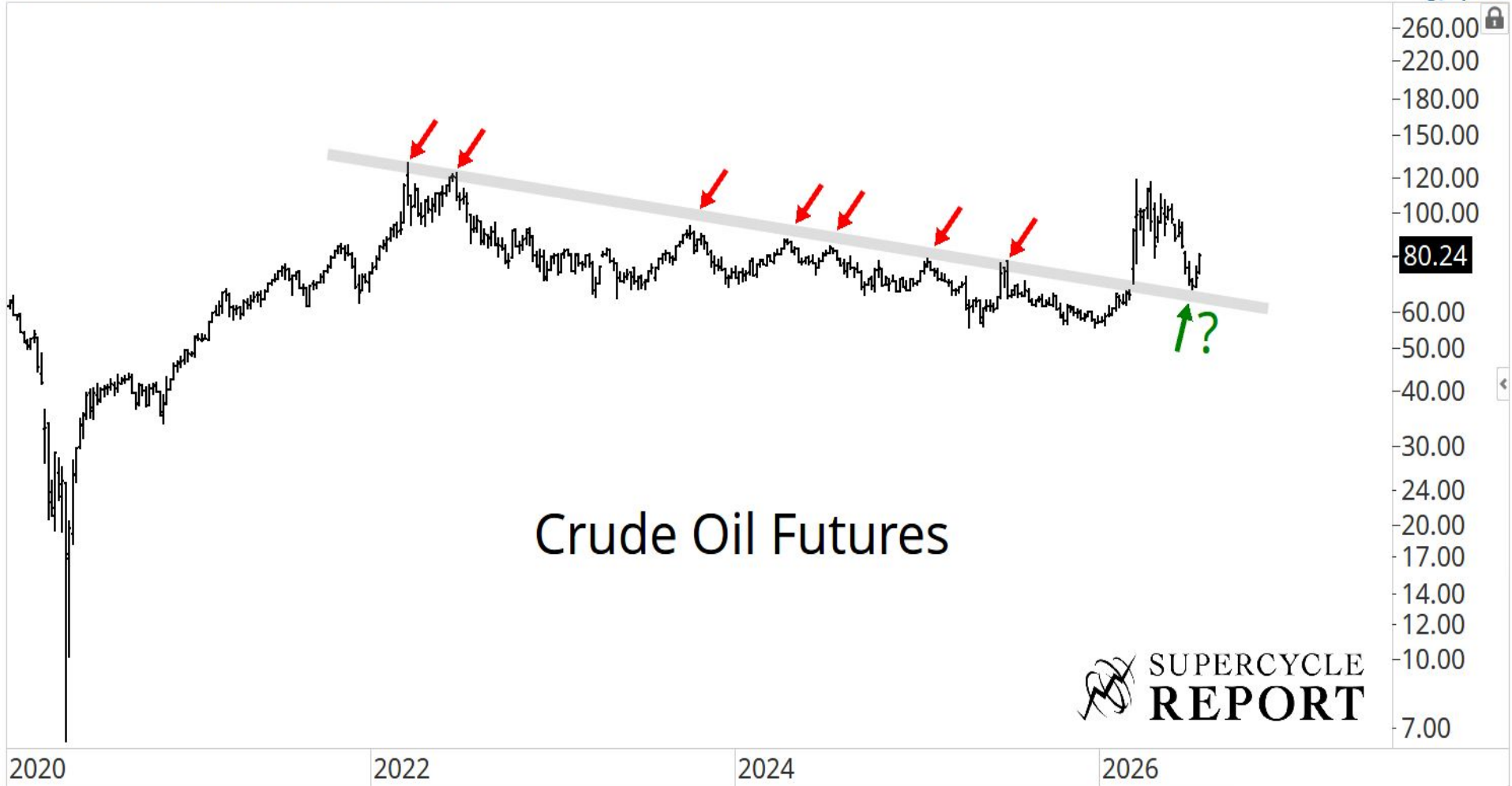
2023

2024

2025

2026

16th Jul 2026

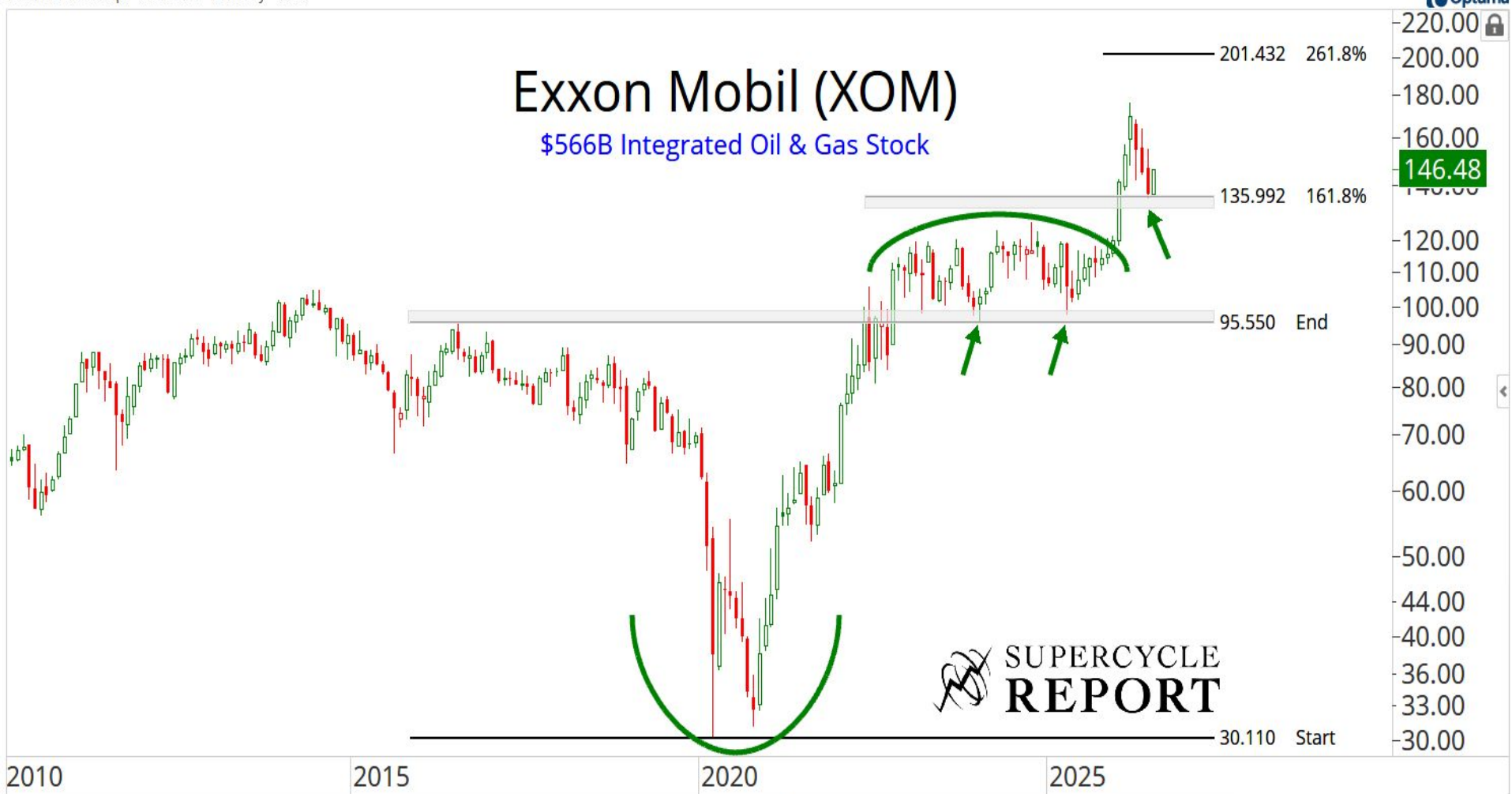


Crude Oil Futures

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Exxon Mobil (XOM)

\$566B Integrated Oil & Gas Stock

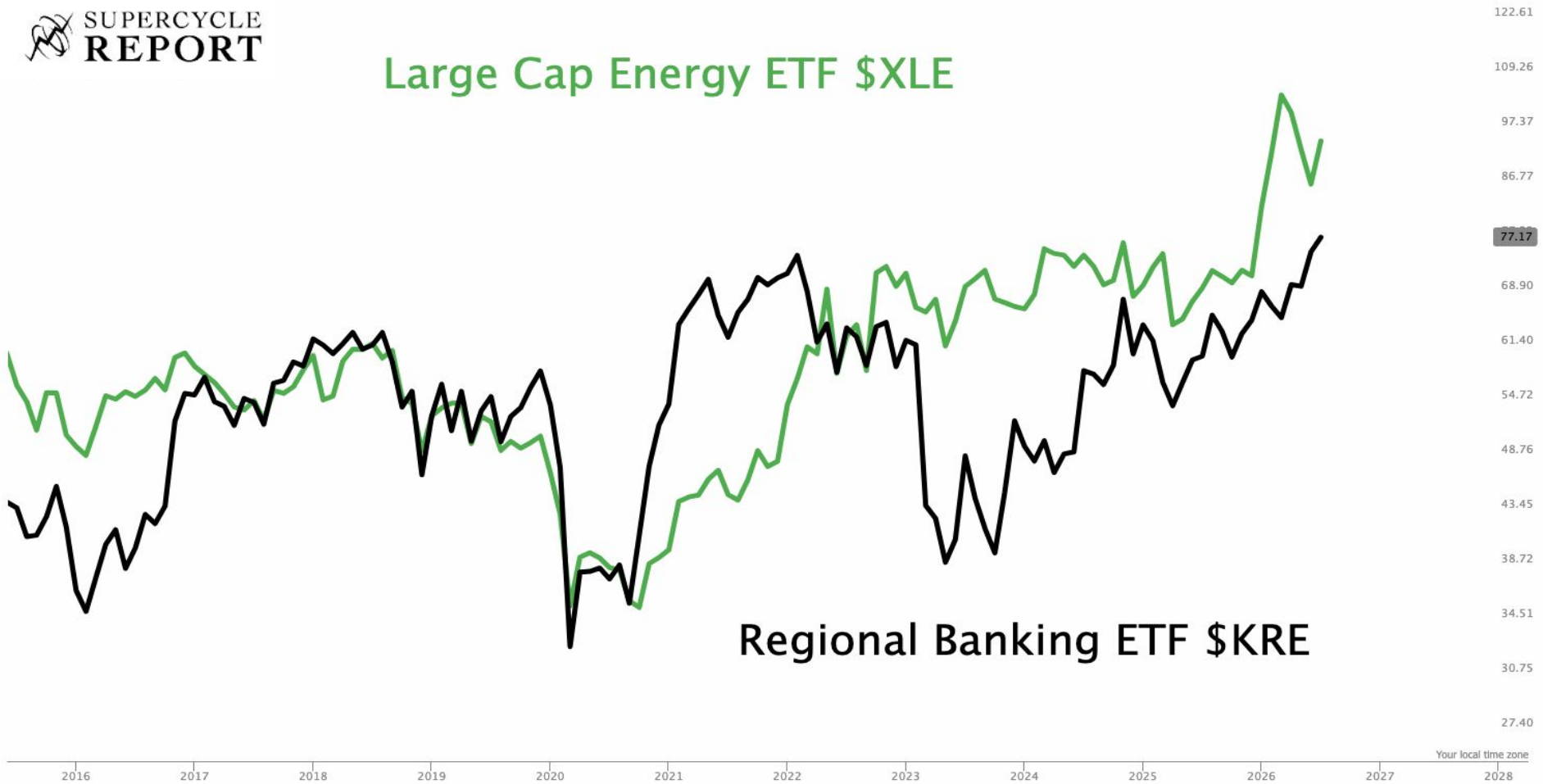


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Large Cap Energy ETF \$XLE

Regional Banking ETF \$KRE



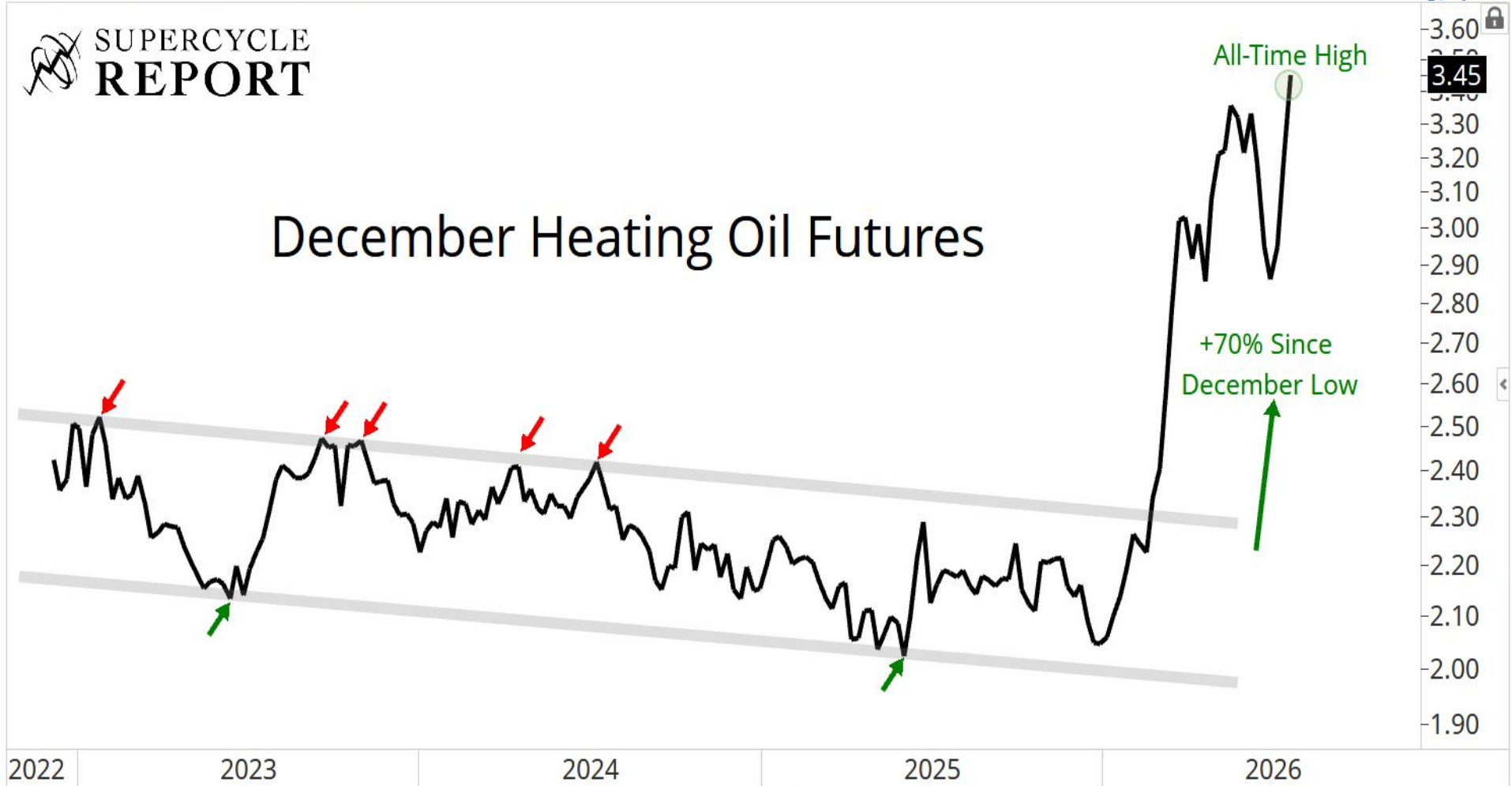
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Heating Oil Futures



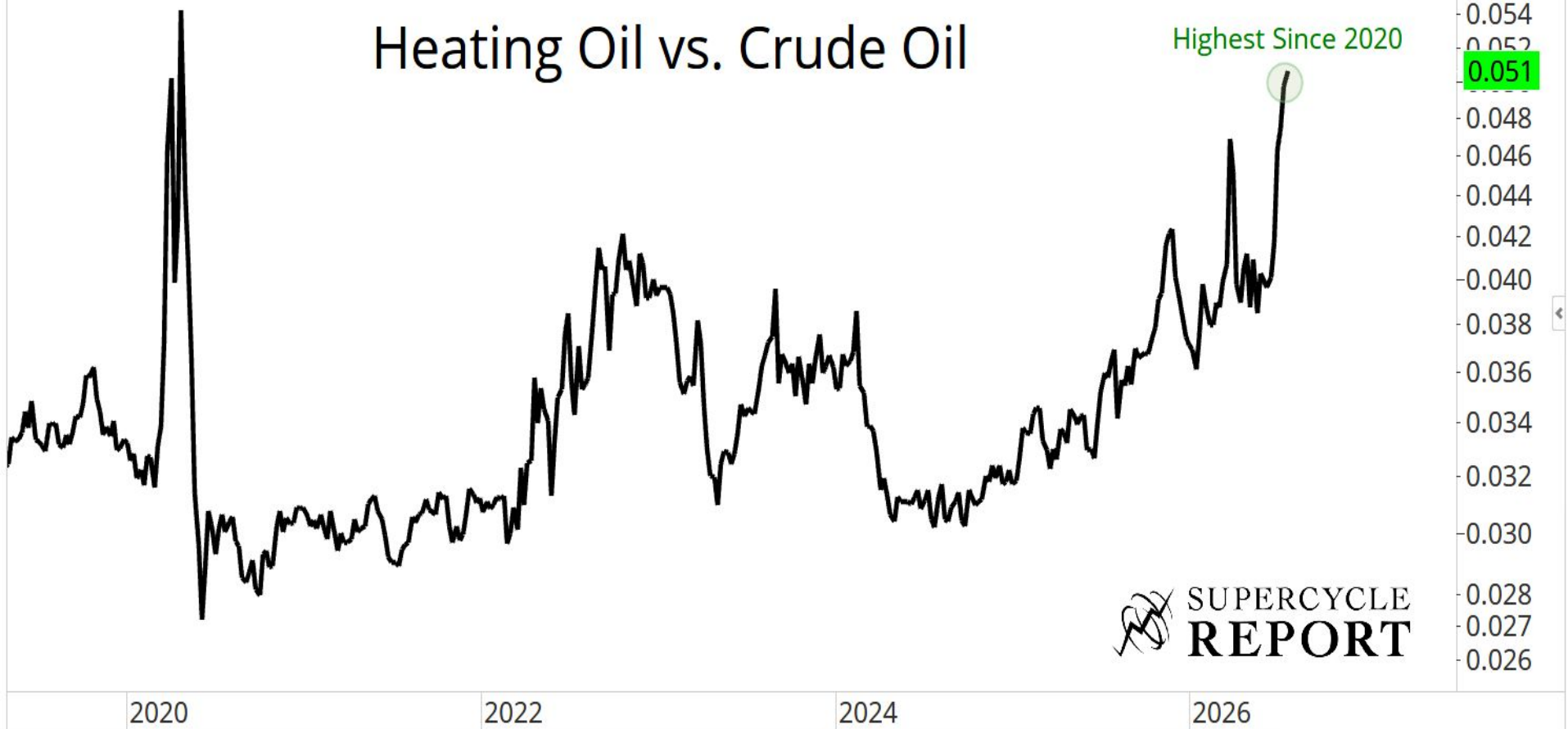
December Heating Oil Futures



Heating Oil vs. Crude Oil

Highest Since 2020

0.051



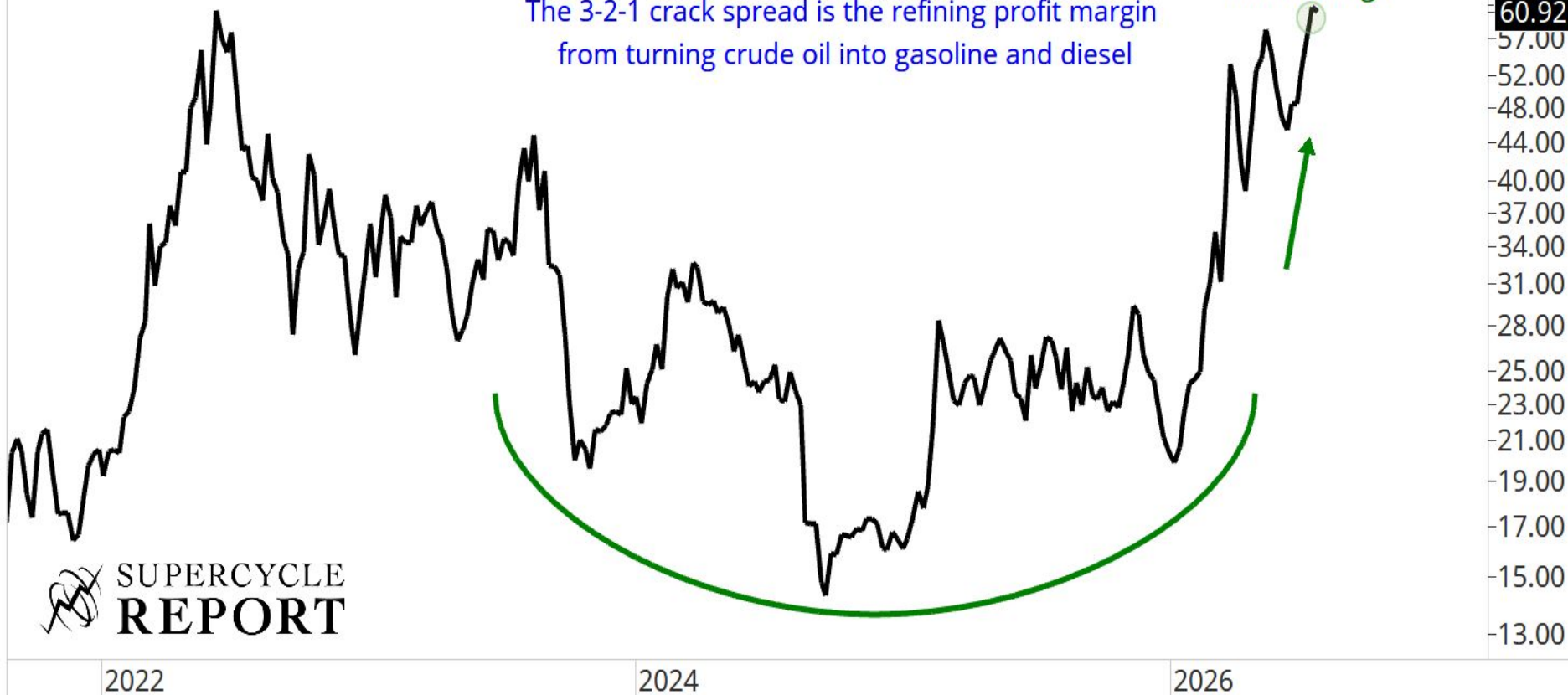
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3-2-1 Crack Spread

The 3-2-1 crack spread is the refining profit margin from turning crude oil into gasoline and diesel

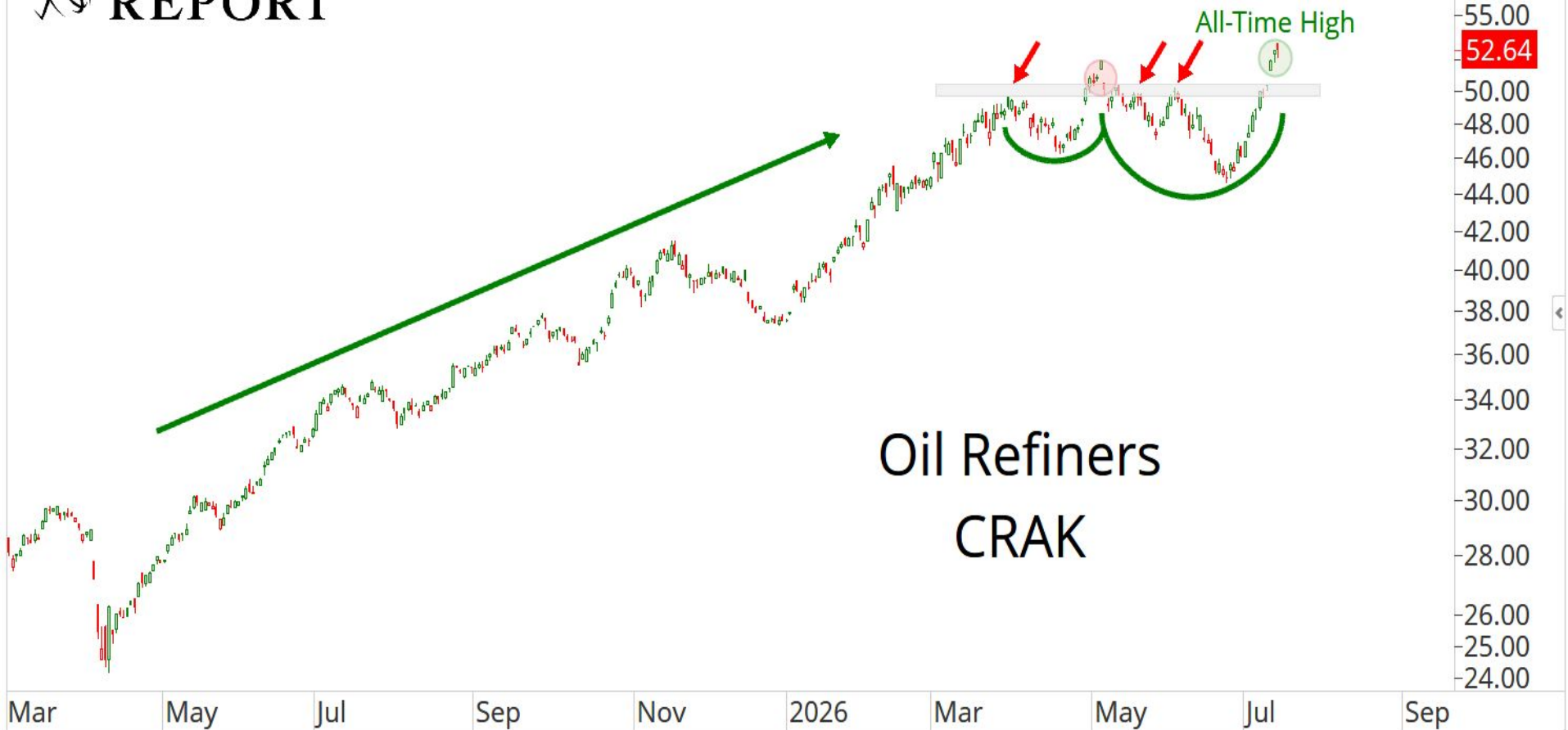
All-Time High

60.92



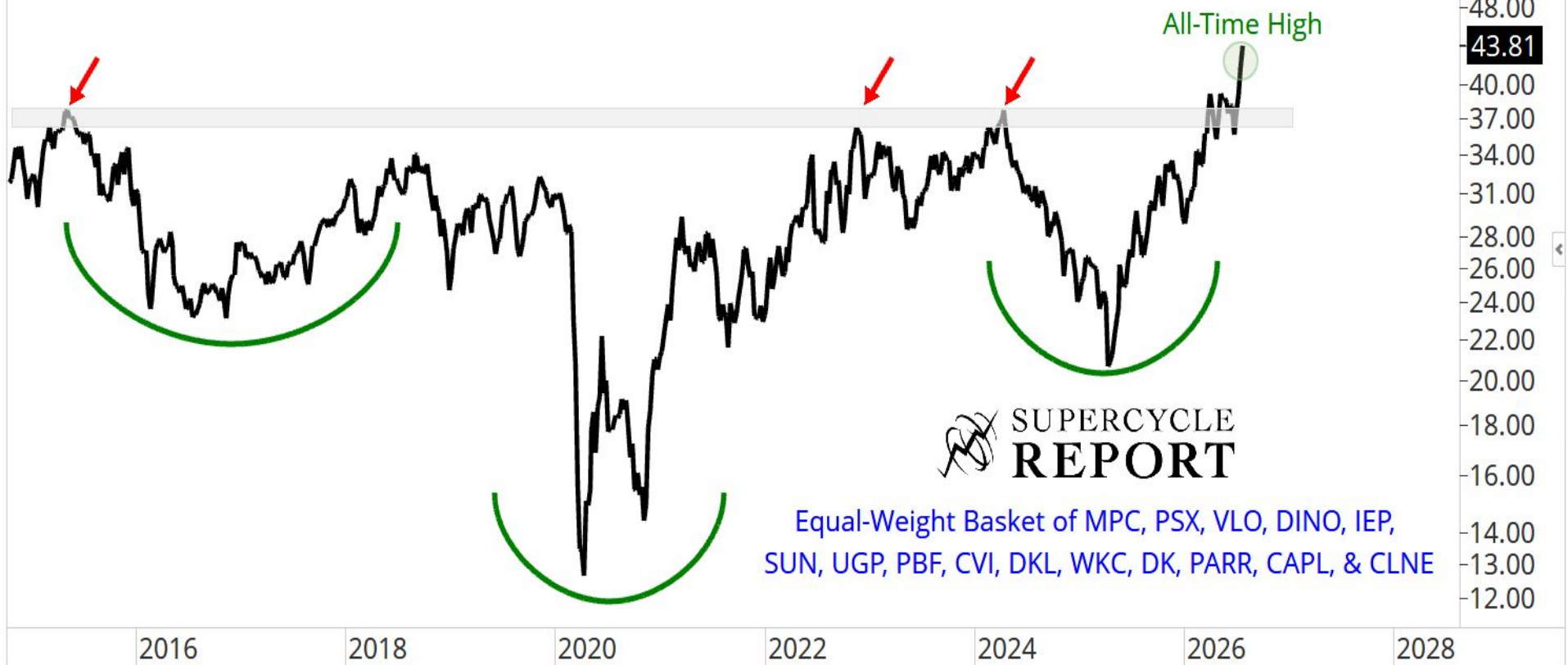
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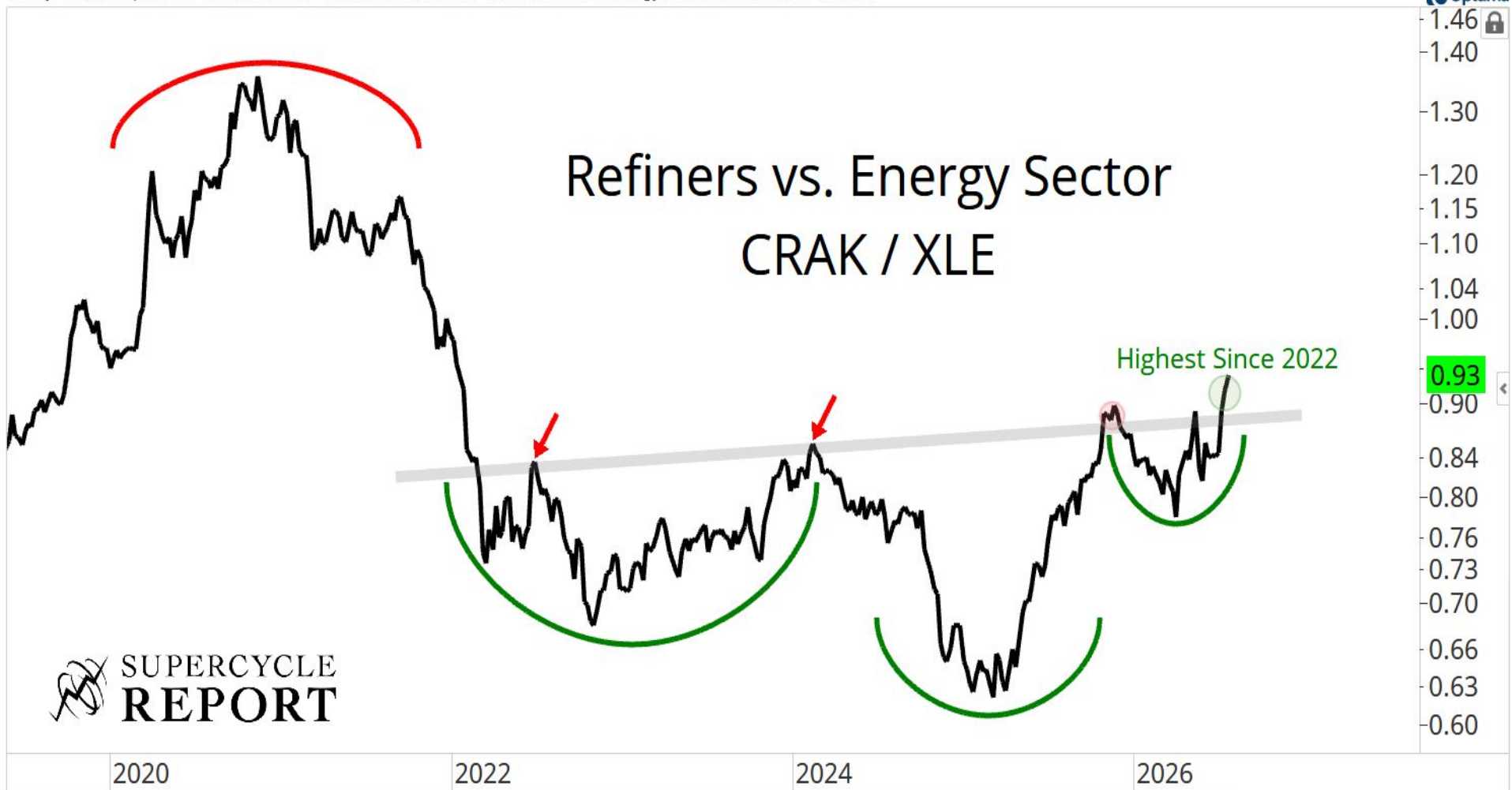
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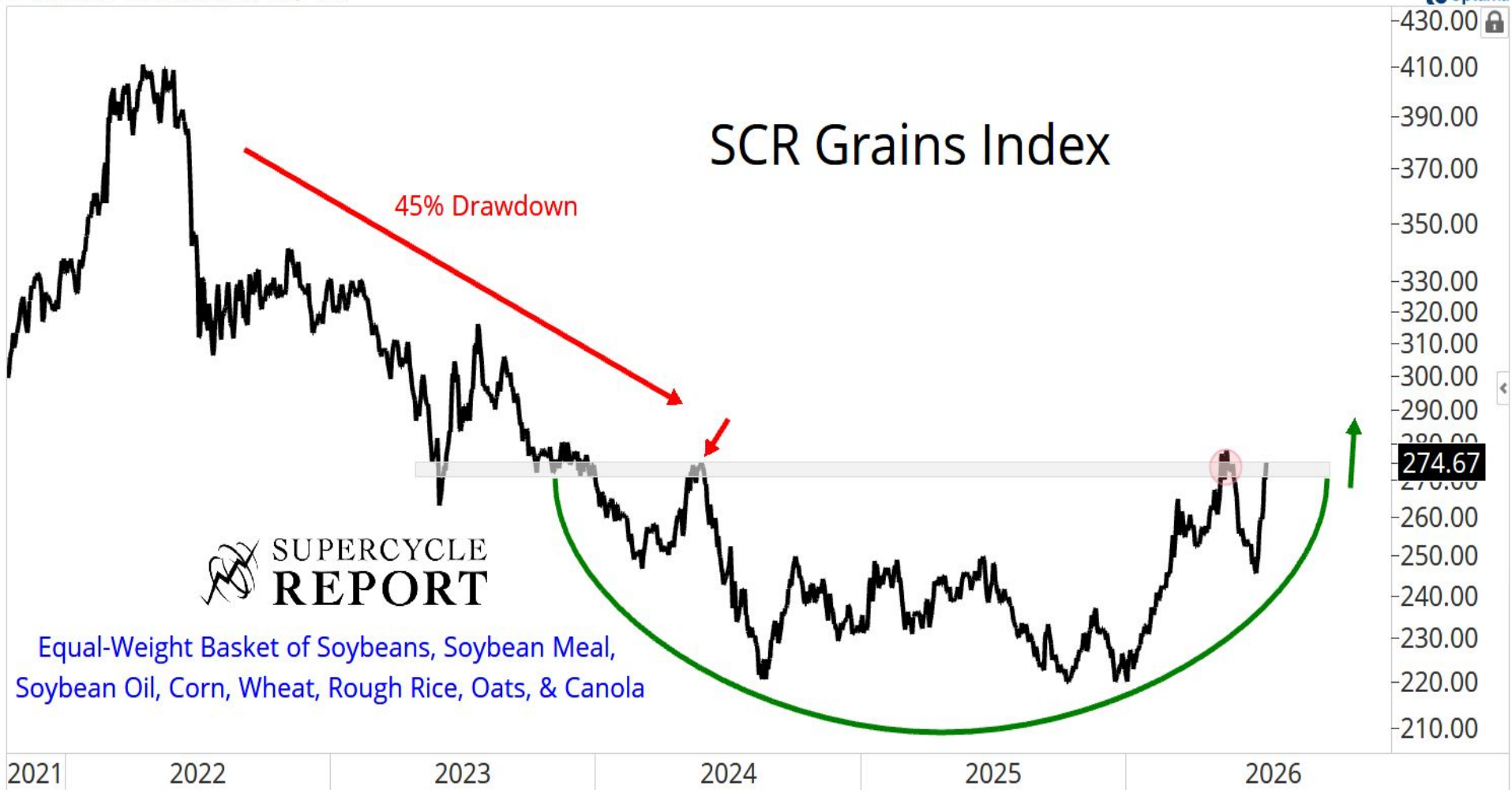


Oil Refiners
CRAK

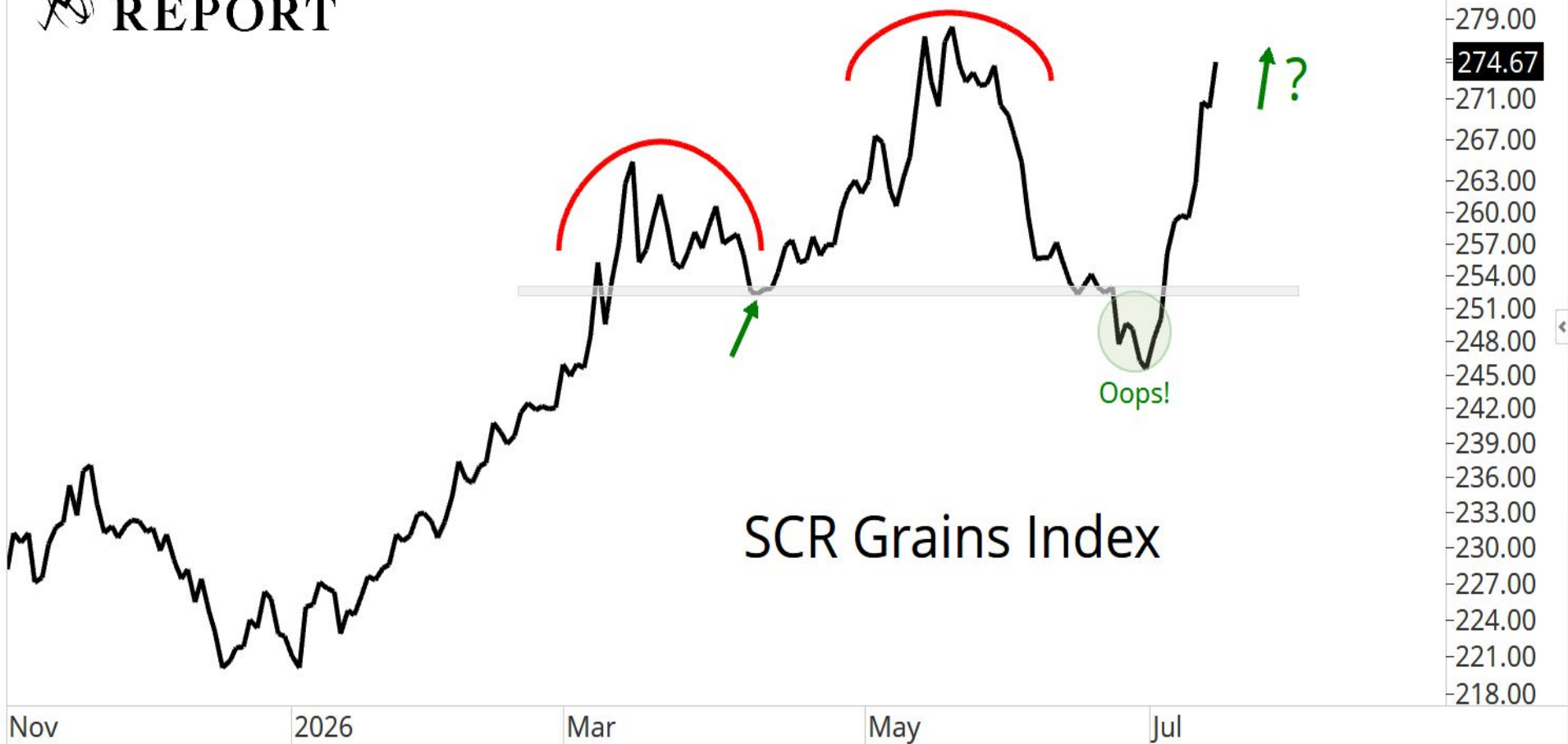
SCR Oil Refiners Index



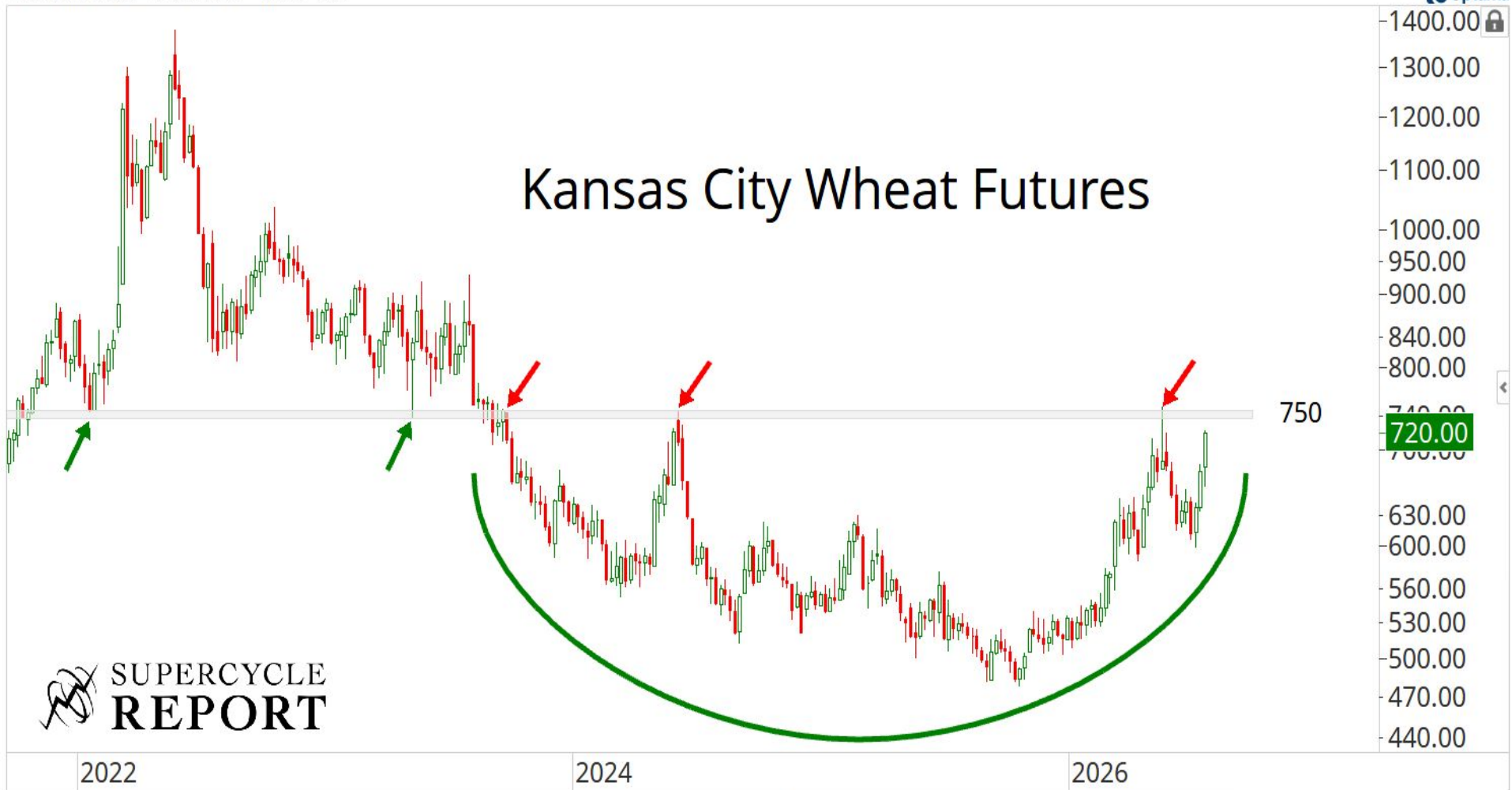




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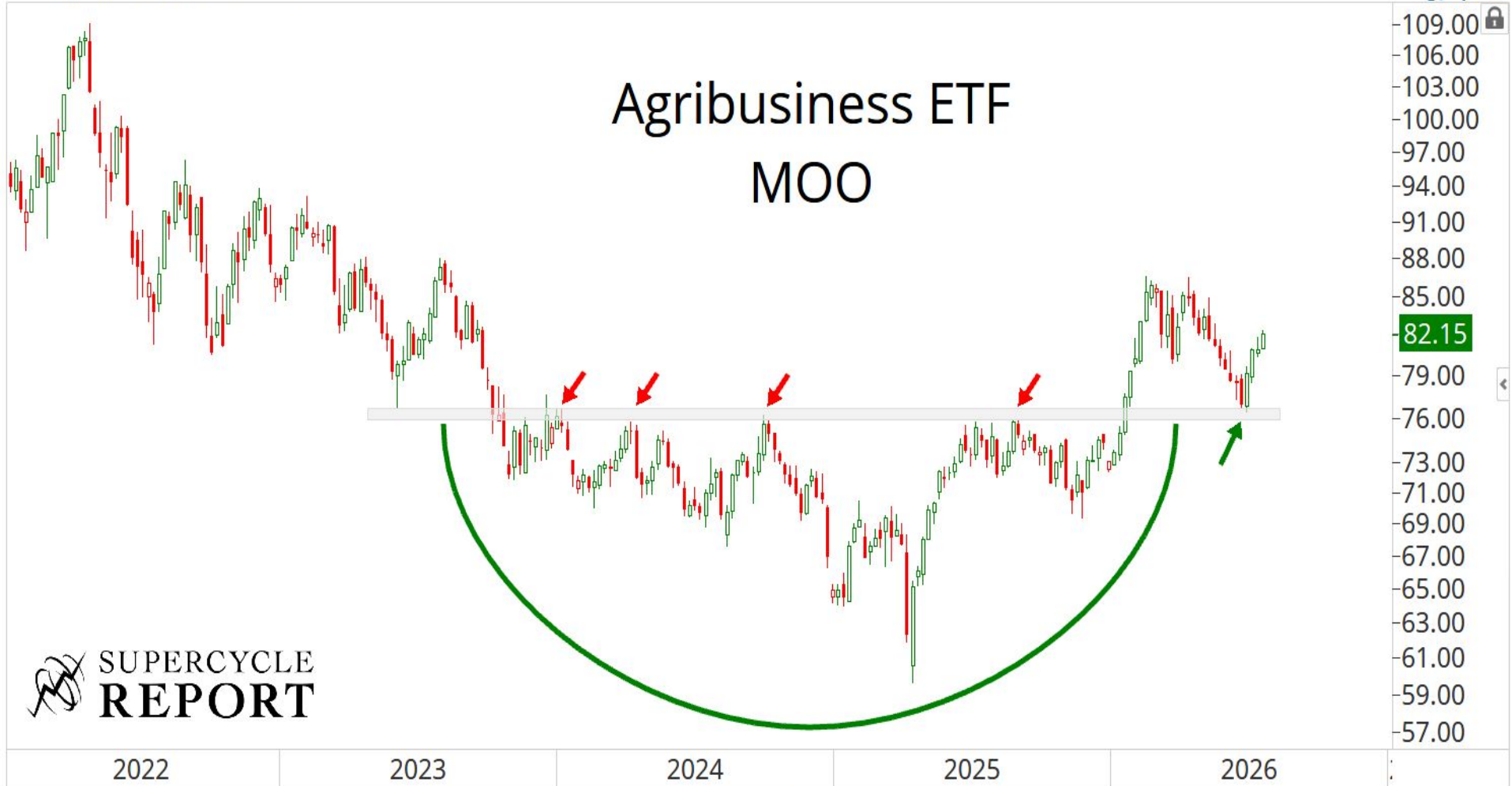


SCR Grains Index



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Agribusiness ETF MOO



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allstarcharts.com/newsletter/supercycle-stocks