



The New **Financial Crisis Report II**

Written and Edited by **David Masao Miyoshi**



Reporting What's Really Happening in America and the World

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We are in the most economically unstable and socially tumultuous period in the history of the modern world. The period covered by the previous Financial Crisis Report was marked by extreme fluctuations in the stock, commodities, and currency markets accompanied by severe and sometimes violent and deadly social disruptions, including historic pandemics, conflicts, riots, and even regime-changing coups. This new Financial Crisis Report II covers the period that begins with the advent of the 47th president of the United States, who argued in the hope of a new America that promises justice for all through strength and the elimination of corruption. This is symbolized by the crest with the scales of justice balanced on a sword that replaces the photo of the writer. The writer believes this is an unprecedented opportunity for the financially astute investor, given the extreme global trade imbalances and distortions in the stock, commodity, and currency markets that will occur as America strengthens economically and militarily. The Financial Crisis Report II is a free compilation of the opinions of David M. Miyoshi, and of those advisors, he subscribes to (with appropriate credits given) on how to benefit during this historic crisis. The writer receives no compensation from advisors whose articles or ideas may appear in this Report II which is issued primarily for CRITICISM, COMMENTARY AND EDUCATIONAL PURPOSES. The reader is welcome to check on all sources of information mentioned herein. Because this writer's and other advisors' opinions and observations are provided herein without charge, the reader is asked to make his/her judgment on the contents. The writer believes the articles presented are honest and sincere empirical observations of what he believes to be the truth. The writer is not perfect, but his north star is the belief that there is truth.

"Give me six hours to chop down a tree and I will spend the first four sharpening the axe." Abraham Lincoln

Month at a Glance

A Daily Timeline of Major Events

By D. Miyoshi



March 1, 2026 — War Opens Across the Gulf

The United States and Israel continued major strikes inside Iran one day after the opening attack that killed Iran's supreme leader, while Tehran launched missiles toward Gulf targets and Israel in retaliation. Oil markets immediately reacted to fears that the Strait of Hormuz could become a war zone.



March 2, 2026 — Oil Shock Reaches World Markets

Crude prices surged sharply as shipping insurers raised war-risk premiums across Gulf routes. Governments in Europe and Asia began contingency planning for prolonged energy disruption.

March 3, 2026 — Evacuations Spread Across the Region

Several governments began organized evacuations of nationals from parts of the Middle East as missile exchanges continued. Naval deployments increased around eastern Mediterranean and Gulf sea lanes.

March 4, 2026 — War Extends Into the Indian Ocean

A U.S. submarine sank an Iranian naval vessel near Sri Lanka, signaling that the conflict had moved far beyond the Persian Gulf itself. The action widened concern that maritime trade routes from Asia to Europe could become unstable.

March 5, 2026 — Financial Markets Turn Defensive

Investors shifted toward dollar assets and sovereign bonds as oil volatility deepened. Airline and shipping sectors led global

Month at a Glance

declines amid rising fuel-cost forecasts.

March 6, 2026 — European Capitals Press for Containment

European leaders intensified diplomatic pressure for a ceasefire while defense ministries reviewed regional security commitments. Insurance rates for commercial transit through Gulf waters climbed further.

March 7, 2026 — Civilian Toll Mounts in Iran

Heavy strikes continued around Tehran and military infrastructure sites as casualty estimates rose sharply. International humanitarian agencies warned that displacement inside Iran was accelerating.

March 8, 2026 — Hormuz Traffic Narrows

Commercial shipping patterns visibly shifted southward as operators sought safer routes around danger zones. Energy traders increasingly priced prolonged disruption into forward contracts.

March 9, 2026 — U.S. Force Posture Expands

Additional American air and naval assets were reported moving toward the theater. Regional governments publicly prepared for a conflict longer than originally anticipated.

March 10, 2026 — Gulf Shipping Hit Again

More commercial vessels reported projectile strikes near strategic sea lanes, reinforcing concern that maritime commerce had become a direct battlefield. Freight insurers adjusted rates again upward.



March 11, 2026 — Strait Attacks Intensify

Three additional vessels were struck near Hormuz, making commercial navigation increasingly uncertain. Energy traders watched shipping maps as closely as battlefield developments.

March 12, 2026 — Washington Debates War Scope

Debate intensified in Washington over whether conflict objectives should remain limited to military degradation or move toward broader strategic restructuring inside Iran.

March 13, 2026 — Refugee Corridors Open

Several neighboring states began temporary humanitarian entry measures as civilian movement out of conflict zones increased.

March 14, 2026 — Technology Sector Absorbs Market Stress

Large technology stocks held relatively firm despite geopolitical volatility, helping steady major U.S. indexes after earlier losses.

March 15, 2026 — Energy Diplomacy Quietly Begins

Oil-producing states increased consultations over reserve capacity should Iranian exports remain impaired.

March 16, 2026 — Naval Surveillance Tightens

Western and regional navies expanded patrol coordination near critical shipping corridors.

March 17, 2026 — War and Inflation Converge

Analysts increasingly linked prolonged Gulf instability to renewed inflation pressure across developed economies.

March 18, 2026 — Federal Reserve Holds Cautionary Line

Federal Reserve Chair Jerome Powell said tariffs and energy pressures were keeping inflation elevated while rates remained unchanged. Markets interpreted the message as warning that war-linked price pressures could persist.



Month at a Glance



March 19, 2026 — Gulf Energy Front Widens
Iran expanded retaliation by striking additional regional energy targets after earlier Israeli attacks on major Iranian gas infrastructure. Energy security again became the day’s dominant global concern.

March 20, 2026 — War Aim and Oil Relief
President Trump said U.S. objectives were nearing completion while Washington issued a short waiver affecting stranded Iranian oil cargoes. Markets treated the move as limited price relief.

March 21, 2026 — Ukraine Returns to Front Page
Russian attacks again damaged electrical systems in northern Ukraine, reminding Europe that its own war remained unresolved even as Middle East headlines dominated.



March 22, 2026 — Hormuz Ultimatum Issued
Washington warned Tehran against any closure of the Strait of Hormuz, where roughly one-fifth of globally traded oil normally passes. The warning underscored how narrow the margin had become between military escalation and economic shock.

March 23, 2026 — Markets Rise on Diplomatic Signals
Oil prices eased after signals that direct strikes on Iranian energy infrastructure might be delayed while talks proceeded. Financial markets responded quickly despite uncertainty over Tehran’s position.

March 24, 2026 — Ceasefire Framework Emerges
A multi-point U.S. proposal for ending the conflict circulated through diplomatic channels, with outside states offering venues for talks. Military deployments nevertheless continued.

March 25, 2026 — Social Media Verdict Marks Legal Turning Point
A Los Angeles jury found Meta and Google liable in a landmark youth social-media addiction case, creating a major precedent for future technology litigation in the United States.



March 26 — Oil Shock Deepens as Markets Absorb Iran War Risk
Global markets turned sharply lower as investors confronted the growing economic consequences of the Gulf conflict. The NASDAQ Composite officially entered correction territory, while crude oil climbed above recent thresholds amid renewed concern over disruption in the Strait of Hormuz. Analysts increasingly described the energy shock as the central force driving inflation expectations into the second quarter.

Month at a Glance



March 27 — Washington Measures the Cost of Extended Conflict

American defense officials disclosed that only about one-third of Iran’s missile arsenal could be confirmed destroyed after weeks of strikes, suggesting the war had entered a more prolonged phase than initially expected. At the same time, oil analysts warned that sustained conflict could keep petroleum prices elevated well beyond earlier forecasts, reinforcing concern that energy rather than direct military loss may become the conflict’s widest global consequence.

March 28 — Diplomatic Signals Emerge but No Cease-fire Materializes

Diplomatic intermediaries indicated that Tehran was reviewing a U.S. proposal containing broad military and strategic demands, yet no formal ceasefire followed. Officials in multiple capitals increasingly described the negotiation effort as exploratory rather than decisive, while military deployments across the region remained unchanged, leaving markets skeptical that de-escalation was near.



March 29 — Asian Markets Fall as Energy Shock Reaches Global Scale

Asian exchanges fell heavily at week’s end as traders reacted to projections that Brent crude could record its steepest monthly rise since 1990. Japan and South Korea posted major losses, while economists warned that higher fuel, fertilizer, and shipping costs were beginning to transmit inflationary pressure far beyond the Middle East. Financial commentary increasingly shifted from war risk alone to recession risk linked to prolonged

March 30 — Oil Shock Deepens as Iran War Pressures Global Markets

Global markets remained under pressure as widening conflict involving Iran, Israel, and the United States pushed energy traders to price in prolonged disruption across the Persian Gulf. Brent crude climbed above \$115 per barrel, marking one of the sharpest monthly oil increases in recent years, while Wall Street indexes drifted lower amid concern that higher fuel costs may revive inflation and delay expected monetary easing later this year. Analysts increasingly viewed the energy spike not as a temporary wartime reaction but as a developing macroeconomic risk likely to affect transportation, food costs, and industrial pricing into April.



This publication features articles written by authors who have been vetted for their expertise in the subject

Conspiracies Theories

they cover. The author's name appears under the title of their article. The authors claim that what they write about are facts the government does not want you to know. We should note that the term "conspiracy theory" was originally employed by the CIA to describe alternate explanations that diverged from official accounts of the government. Recently, RFK Jr. said the term is now used to discredit individuals or discourage critical thinking. Or, in other words, to prevent one from seeking the facts.

From time to time, I will provide selected articles from the Conspiracy Report that I believe are true. Some articles have been shortened for brevity. I hope you find them interesting, if not edifying.

D. Miyoshi



Privacy in America is dead and buried. The current population of the United States is estimated at somewhat over three hundred and forty million people. The estimated number of surveillance cameras in the United States is around eighty-five million...

By Egon E. Mosum

Nineteen eighty four wasn't a very good year in the novel by that name. But it appears that American society and infrastructure is rather fond of that year.

Because it appears that we are celebrating it every day of every year, and everywhere.

Some sixty years ago, there was a humorous television show titled "Candid Camera". The show played pranks on unsuspecting people, and it was filmed for all in the audience to see.

Nowadays, the situations aren't all silly, and the cameras are anything but candid.

And it's not just cameras, it's our computer that tracks our every move, it's the virtual 'assistant' that records our every command.

Privacy in America is dead and buried.

The current population of the United States is estimated at somewhat over three hundred and forty million people. The estimated number of surveillance cameras in the United States is around eighty-five million.[1] (That was a 2021 estimate).

Do the math and you get one surveillance camera for every four people in the country. In New York City alone, just counting municipally operated cameras, we are talking about twelve thousand.[2]

Then of course, there are the private cameras, the security cameras, the drones.

Advocates for these ubiquitous cameras spout off about reduced crime rates. Depending upon the crime and the location, there have been some reductions. But not as much as one might think, and at what cost to individual privacy rights?



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The greatest reduction of crime by the use of Closed-Circuit Television (CCTV) cameras is in the places where the public parks their cars. The estimated reduction of crimes in this space is fifty one percent.

Nice to know our hubcaps have a better than equal chance of remaining in situ.

After you leave your car in the parking lot, and take a walk through the town center, your camera benefit goes down, and only a ten percent reduction of crime is reported.

If you are in a housing project, or a gated community, or if you're taking public transportation, the presence of closed-circuit television cameras does virtually nothing to reduce crime. But it does a great job of encroaching on your privacy.[3]

In a 2004 Australian study, while video surveillance did reduce property related crimes, it had no measurable effect on violent crime.[4]

In a report by the American Civil Liberties Union, it was revealed, *'There is extensive academic literature on the subject — studies carried out over many years — and that research strongly indicates that video surveillance has no statistically significant effect on crime rates.'*[5]

That report reflected a study between 2000-2008.

While both public and private users of video surveillance have gone to great lengths to make their cameras ubiquitous, the impotence to affect violent crime within a short length of the camera lens demonstrates little more than trick photography.

In that aforementioned American Civil Liberties Union

report, it was stated *'Regarding violent crime, there appeared to be no statistically significant change in the level of crime anywhere in the 500 foot range around the cameras. When violent crimes were disaggregated, a decline in homicide was observed within 250 feet of the cameras, however this reduction was offset completely by an equal increase in homicides between 250 and 500 feet from the cameras.'*

So at best, these surveillance devices have made our society's murderers a tad camera shy.

It appears that their victims weren't ready for their close up.

Members of the public are not all enthusiastic fans of this society under surveillance.

In a 2013 *Harvard Law School Law Review* article, it was posited, *'Surveillance menaces intellectual privacy and increases the risk of blackmail, coercion, and discrimination; accordingly, we must recognize surveillance as a harm in constitutional standing doctrine.'*[6]

Imagine a peaceful protest being carried out in public regarding some issue or another. There is the exercise of free speech and the right to assembly.

Now imagine that some governmental agency, city, state or federal — or all three have their cameras trained on the protestors.

It doesn't take much imagination to conjure up a society that instead of having free speech and freedom of assembly, there is fear in the population, fear of who is watching, and what their intentions are in watching.

Regardless of the lighting conditions in which the surveil-





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lance is taking place, there will be a definite shadow cast on certain constitutional rights of our citizenry.

Besides privacy rights being negatively impacted, surveillance activities such as government red light cameras can sometimes unjustly lighten the wallets of the public, when they are found to be, or the interpretation of their images are found to be, erroneous.

Your author, in his role as an attorney, once defended an innocent driver when a red light camera took a blurry picture of a car that was the same make as his, but only had a blurry image of the license plate — and the police got it wrong, by one digit.

Fortunately, the client was acquitted.

More seriously, biometric identification cameras can not only be biometric, but racially biased and cause misidentification of people who are of a darker complexion.

Researchers have reported results that demonstrate, *‘Across all the datasets and systems, we generally find that photos of individuals who are masculine presenting, older, of darker skin type, or have dim lighting are more susceptible to errors than their counterparts in other identities.’* [7]

Back to the red light districts of the highways, there are states that have outlawed cameras in search of red light violators — not surprisingly, the state of Texas in 2019 said ‘Sorry, but this state isn’t big enough for *them thar* cameras, and outlawed them.’[8]

Now Texas may be the lone star state, but it isn’t alone in banning these cameras, as they have also been banned in *Maine, Mississippi, Montana, New Hampshire, South Carolina, South Dakota, Texas, and West Virginia.*’[9]

WHY YOU SHOULD CARE

Since the twenty first century began our society has seen a geometric progression in the use of surveillance cameras and other recording devices targeted at our citizenry.

It’s no surprise that the government invokes the magic words of security or national security, or traffic safety, or some other mantra to excuse its encroachments on our constitutional rights.

But the reality is the greatest effect of this surveillance state is the diminution of constitutional rights, while only a marginal safety or security effect is realized.

Many of the readers served in the military and swore to uphold and protect the constitution of the United States. Some readers may be attorneys under the same obligation.

But regardless of your personal history, you, the reader in the United States are the intended beneficiaries of the rights *guaranteed* to our citizenry.

You have the right to free assembly, the right to freedom of speech, you have privacy rights — these are not suggestions or privileges — they are rights.

As surveillance cameras and other similar devices become more widespread, those aforementioned rights become less widely safely exercised.

Some states are making progress in retarding the progress of ubiquitous surveillance, and are trying to turn the calendar back from nineteen eighty-four.

Do you live in one of them?



Interesting Facts

Perhaps no bills pack a more befuddling display into an innocuous package than the \$1 note. The humble dollar bill offers a rich tapestry of symbolism for those who take the time to examine the craftsmanship a little more closely. Here are the explanations behind seven of the dollar bill's more perplexing elements.



Serial Numbers

To start with perhaps the least mysterious, the obverse (or front) of the bill features several numbers. The longer ones off to the top right and lower left of George Washington's portrait are the serial number, with the first letter of each series identifying the Federal Reserve Bank that issued the note. That same letter appears in the middle of the Federal Reserve District seal, to the left of Washington, and also corresponds to the four numbers located near the number "1" at each of the four corners. For example, the Second Federal Reserve District is New York, so a \$1 bill from that district would have a prominent "B" within the Federal Reserve District seal and at the front of the two serial numbers, as well as the number "2" near each of the four corners."



Treasury Seal

Also on the front, the green imprint to the right of George Washington is the U.S. Treasury seal. Designed by Francis Hopkinson, a New Jersey delegate to the Continental Congress, the Treasury seal features a set of balanced scales, which represents justice.

The inverted "V," known as a chevron, is lined by 13 stars, symbolic of the original 13 colonies. At the bottom of the seal, the depiction of a key stands for authority.



Bald Eagle

The reverse of the dollar bill features the two sides of the Great Seal of the United States, created in 1782 by Secretary of Congress Charles Thomson from the recommendations of three committees. The front of the seal, to the right of the word "ONE" emblazoned across the middle, features the American bald eagle, wings spread as if in flight. The eagle grips 13 arrows in its left talon, emblematic of war, and an olive branch signifying peace in the right talon. The bird's head is notably turned in the direction of the olive branch to exemplify the nation's preference for peace. Famously, Benjamin Franklin objected to the choice of an eagle as the national symbol; the statesman wrote that he preferred the "more respectable" turkey. The bird's presentation on currency also proved a source of controversy on one occasion. The 1801 U.S. silver dollar inadvertently showcased the arrows, rather than the olive branch, in the eagle's right talon, apparently a signal to Europeans that the young nation was primed for war. This misunderstanding was corrected by 1807 when a reissued coin switched the positions of the bundles.



Shield

According to Thomson's official explanation of the design, the

Interesting Facts

shield, or escutcheon, stands in front of the eagle "without any other supporters to denote that the United States of America ought to rely on their own Virtue." The shield displays 13 vertical lines of alternating shades to represent the first states, which together prop up a horizontal band that stands for the unifying force of Congress. While the bill mostly features varying shades of green and white, the original seal provides even more significance when seen in full color. The vertical lines are alternately red, representing hardiness and valor, and white, for purity and innocence, while the blue horizontal band symbolizes vigilance, perseverance, and justice.

motto encapsulates the cause of the American states. Across the back of the bill, which features the reverse side of the Great Seal, the phrase *Annuat Coeptis* above the pyramid translates to "Providence Has Favored Our Undertakings." Below, the inscription *Novus Ordo Seclorum*, meaning "A New Order of the Ages," refers to the inception of the U.S. government. It was in large part that last phrase that resulted in the Great Seal being featured on the dollar bill. While earlier printings had different designs, President Franklin D. Roosevelt believed that the phrase "A New Order of the Ages" would remind the public of his New Deal, resulting in the bill's reformatting in 1935.



Stars

Above the eagle's head, a conglomeration of 13 stars floats in the middle of a glory-like display of light and cloud. Again, the 13 stars represent the original 13 colonies, here emerging as a new nation among the world's sovereign entities as a new constellation would appear among the other stars in the sky.

Pyramid and Eye

Perhaps the most cryptic and controversial symbols to adorn the dollar bill are the pyramid with its detached capstone and embedded eye. The pyramid signifies "strength and duration," according to Thompson, though others suggest the structure's unfinished form represents America's status as an unfinished creation. The pyramid consists of 13 rows, with the year of the nation's founding printed in Roman numerals on the lowest level. Meanwhile, the giant floating eye, traditionally known as the Eye of Providence, was explained by the designer as another of the "signal interpositions of providence in favor of the American cause." These particular symbols have been fodder for conspiracy theorists who believe U.S. currency is filled with references to shadowy organizations such as the Freemasons. However, the Eye of Providence had already been a well-known Christian symbol of God's benevolent watchfulness by the time the Great Seal of the United States was created in 1782. The incorporation of both the eye and the pyramid into the Great Seal predated their widespread use among the Freemasons.



Latin Inscriptions

The back of the bill also features several Latin inscriptions. The eagle clutches a scroll in its beak that reads *E Pluribus Unum*, which translates to "Out of Many, One." Possibly borrowed from the London-published *Gentlemen's Magazine*, which was well known among educated Americans in the late 18th century, the

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Bonus: Owl/Spider

Depending on the eye of the beholder, a white speck perched on the top left border of the top right “1” on the front of the bill appears to be a spider or an owl when magnified. Again, this piques the interest of the conspiracy-minded who note that an owl is a symbol of the Illuminati. However, there is no mention of a deliberately created creature in that area among the founding documents, and other sharp-eyed observers have pointed out that this alleged symbol is more likely part of the dollar’s webbed background design.

CIVIL UNREST WATCH



March Civil Unrest Watch

March’s unrest picture was defined less by one dominant uprising than by a pattern of politically and economically driven protests spreading across very different systems. What connects them is not ideology but pressure: publics reacting to perceived institutional failure, economic strain, or democratic backsliding. One of the month’s clearest examples came from **Turkey**, where

thousands gathered in Istanbul on the first anniversary of the arrest of opposition figure Ekrem Imamoglu. Reuters reported that the rally, organized by the CHP, framed Imamoglu’s detention as evidence of judicial politicization and democratic erosion ahead of the next presidential cycle. The significance of the protest was not simply its size, but its durability: a year after the arrest, the issue still draws people into the streets, suggesting that grievances tied to legitimacy and rule of law do not dissipate quickly once they become symbols.

A second pattern came from **international protest mobilization tied to the war in Iran**. Reuters, citing ACLED data, reported on March 11 that demonstrations had spread around the world in response to the largest U.S. and Israeli attacks on Iran in decades. That matters because it shows how foreign conflict now travels quickly into domestic civic space elsewhere, converting geopolitical events into street-level activism across borders. In other words, war abroad increasingly generates unrest at home—not only in the directly affected states, but in allied, diaspora, and activist communities worldwide.

Economic stress also remained a reliable accelerant. In **Chile**, Reuters reported public protests, student marches, and temporary subway-station closures after a sharp fuel-price increase tied to higher global energy costs. Separately, AP reported that thousands of Chileans protested the rollback of environmental protections on March 22, while Reuters video coverage described student demonstrations against new education policies on March 26. These were not identical movements, but together they illustrated a familiar civic chemistry: when price shocks, policy reversals, and distrust of government converge, unrest becomes less an isolated event than an available public language for dissent. Labor unrest added another layer. In **Victoria, Australia**, up to 35,000 teachers rallied in Melbourne on March 24 in what was described as the largest teachers’ demonstration in the state’s history, disrupting roughly 500 public schools. The dispute centered on pay, class size, staffing shortages, and support resources. The episode is a useful reminder that civil unrest is not confined to riot imagery or ideological confrontation; it often appears in disciplined, mass workplace action that signals declining confidence in institutional responsiveness.

Taken together, these events suggest that unrest in March was not random. It clustered around three recurring triggers: perceived democratic unfairness, economic strain, and institutional nonresponse. Different countries, different slogans, same underlying machine.

Closing Reflection

What I see this month is a world where civil unrest is becoming less exceptional and more procedural. People are not always taking to the streets because they expect transformation; often they are doing so because protest has become one of the few remaining ways to register that normal channels are not working. Turkey shows how legitimacy disputes can harden into long-term mobilization. Chile shows how economic pain and policy grievance can overlap and widen the protest base. The Iran-war demonstrations show how global conflict now leaks rapidly into domestic civic life across borders. None of this necessarily points

AI Watch

to imminent breakdown. But it does point to something slower and more durable: a public increasingly conditioned to treat friction, protest, and disruption not as interruptions of normal politics, but as part of how normal politics now operates.

AI WATCH



Keeping an eye on the world of AI: what really happened this month, why it matters for everyday people and businesses, and what steps you can take to use the good while guarding against the bad.

March 2026 - AI Watch

Technology, Policy, and Societal Impact

Headline of the Month

Washington moved AI policy from abstract positioning toward an explicit federal legislative blueprint.

Subtitle

March showed that the center of gravity in AI is shifting from model novelty to regulatory architecture, legal exposure, and infrastructure politics.

Briefs

The month's most consequential AI development came on **March 20**, when the White House released **A National Policy Framework for Artificial Intelligence**, a formal legislative blueprint urging Congress to establish a unified federal standard and explicitly limit conflicting state AI laws. The document is not binding law, but it matters because it is the clearest federal signal yet that Washington wants AI governed through a lighter national framework rather than a patchwork of fifty state systems. The framework emphasizes child safety, intellectual property, workforce readiness, infrastructure expansion, and protection against AI-enabled fraud, while also warning against broad liability rules that might slow domestic deployment.

That federal push immediately sharpened an already active legal fault line: whether Washington can realistically override states that have already enacted their own AI statutes. Legal analyses

published this month noted that states such as **California, Colorado, and New York** are continuing forward with their own compliance regimes despite federal resistance. In practical terms, that means companies operating nationally still face a split reality: Washington may want uniformity, but compliance departments still have to map multiple legal environments at once. A little bureaucratic chimera with fifty heads

March also kept pressure on the courts. Copyright litigation involving training data continued to expand, with judges increasingly willing to test whether traditional copyright doctrines can stretch over large-scale model training. These cases remain slow-moving, but they are becoming structurally important because they may decide whether future model development depends on negotiated licensing rather than broad scraping assumptions. The legal question is no longer theoretical: what counts as "learning" for a machine may soon carry a defined price tag.

Meanwhile, AI's physical footprint became harder to ignore. Federal policy discussions this month repeatedly tied AI expansion to **electricity demand and data-center buildout**, with policymakers warning that AI infrastructure must not quietly raise power costs for households. That is an unusually concrete shift in tone: AI is no longer discussed only as software, but as an industrial system that competes for land, energy, cooling capacity, and transmission lines. The machine now has an appetite, and it eats megawatts.

Regulatory Watch

March's clearest regulatory signal is that federal policymakers increasingly prefer to regulate **AI harms through existing legal categories**—consumer deception, copyright, unfair practices, and liability—rather than invent entirely new agencies. At the same time, the political battle over federal preemption suggests that AI regulation in the United States will remain contested terrain rather than neat architecture for some time.

Verify AI Media

This month reinforced a simple rule: the smoother the content looks, the less visual polish should reassure you. Verification still depends on source chains, publication origin, timestamp consistency, and whether independent institutions confirm the same material. If a clip appears dramatic and arrives perfectly tailored to outrage, treat it like a suspiciously polished gemstone—admire the sparkle, then inspect the edges.

Legal Note

AI Watch summarizes current events and regulatory developments. It is provided for informational purposes only and does not constitute legal advice. Readers should consult qualified professionals regarding specific applications of AI in their businesses or personal affairs.

Closing Reflection

What stands out to me this month is that AI policy has entered its less glamorous but more consequential phase: paperwork, jurisdiction, and enforcement theory. The public often watches product launches, but the deeper story is that governments are now

Winds of War

deciding who writes the rules before habits harden beyond recall. March did not deliver a dramatic technical leap; it delivered something more durable—a visible contest over who governs the next decade of machine intelligence. In history, that often matters more than the headline model release, because once institutions choose a framework, innovation tends to flow through the channels that framework permits rather than the ones engineers first imagined.

March suggests that the central AI contest is no longer invention itself, but who will define the rules under which invention is allowed to scale.



March 2026

Geopolitical Risk Brief Financial Crisis Report

March ended with the international system under visible strain across several theaters at once, and the pattern was not one of resolution. It was one of widening pressure: intensified attacks in Ukraine, renewed regional escalation tied to Iran, persistent maritime risk, and continued military signaling in the South China Sea.

The sharpest battlefield signal came from **Ukraine**, where Russia launched some of the war's heaviest drone barrages late in the month. Reuters reported that a rare **daytime** Russian drone and missile assault on **March 24** killed civilians and struck cities including Lviv, while AP reported a separate late-March attack involving **nearly 400 drones** and additional missiles across more than ten cities, reinforcing the view that Russia's spring offensive had begun. The significance of these attacks lies not only in their scale, but in their purpose: they pressure air defenses, stretch civilian resilience, and remind Ukraine and its backers that attrition remains Moscow's preferred strategic language.

The war's spillover effects were also visible beyond Ukraine's borders. AP reported that Russian strikes on Ukrainian infrastructure disrupted a key power line, prompting **Moldova** to declare a **60-day energy emergency**. That is a useful reminder that

modern war often travels through grids and cables as much as through front lines. A strike in one country can destabilize the civilian life of another without a single troop crossing a border. In the **Middle East**, the month's most consequential shift was the widening risk around **Iran** and the maritime routes tied to the conflict. Reuters reported on March 27 that Yemen's **Houthis** declared themselves ready to intervene directly if additional countries joined the U.S.-Israeli war on Iran or if the **Red Sea** were used for attacks on Iran. Reuters also reported that protecting the **Strait of Hormuz** would be even harder than the failed Western effort to secure Red Sea shipping from Houthi attacks, with roughly **20% of global oil and gas supply** normally moving through Hormuz. The strategic implication is plain enough: regional war now carries a direct energy-market and shipping-risk dimension that can transmit instability well beyond the battlefield.

The **Israel-Gaza** theater remained in an uneasy political-military holding pattern rather than true settlement. Reuters and AP both reported on a U.S.-backed proposal for **Hamas disarmament** in staged phases tied to Gaza's future governance, reconstruction, and Israeli withdrawal. That matters because even where large-scale fighting has eased relative to earlier phases, the conflict's core questions—arms, authority, and enforcement—remain unresolved. A ceasefire that cannot settle those questions is less a peace than an intermission with paperwork.

Meanwhile, the **South China Sea** continued to demonstrate how gray-zone coercion works: short of declared war, but fully real. Reuters reported that the **Philippines and France** signed a military pact on **March 26**, enabling joint training and reflecting Manila's effort to deepen defense ties as tensions with China rise. The agreement came shortly after an incident in which a **Chinese missile frigate** reportedly carried out an unsafe maneuver near a Philippine naval vessel close to **Thitu Island**. This kind of episode matters because it compresses the distance between diplomacy and accident. Rearmament, legal agreements, and unsafe encounters all begin to stack on top of one another.

Closing Reflection

What stands out to me this month is how war is increasingly experienced as a system of overlapping pressures rather than a set of isolated fronts. Ukraine shows what sustained attrition looks like when drones, missiles, and energy disruption become routine instruments of pressure. The Iran-centered escalation shows how quickly regional conflict can mutate into a shipping and energy crisis with global reach. The South China Sea reminds us that not all dangerous military encounters arrive under the label of war; some arrive as maneuvers, escorts, and agreements signed in response to the last near miss. I do not read March as a month of sudden strategic transformation. I read it as a month in which several dangerous patterns became harder to dismiss as temporary. That is often how larger crises mature: not through one dramatic rupture, but through the repeated normalization of risk. March suggests that global tension is no longer episodic, but structural—reshaping how states, markets, and alliances operate.

Iran War Watch

IRAN WAR WATCH



March 2026

The operating picture has shifted from deterrence to sustained degradation. Israeli and U.S.-aligned strikes are now focused less on symbolic retaliation and more on systematically reducing Iran's missile production, launch survivability, and naval disruption capacity. Current reporting indicates another round of strikes on central Iranian military-industrial targets, including facilities tied to missile and naval mine production, while U.S. assessments suggest a significant portion of Iran's accessible missile inventory has been destroyed or rendered difficult to deploy. The practical result is that Iran still retains retaliatory capability, but its ability to generate sustained, coordinated salvos appears increasingly constrained.

A second development is the renewed diplomatic channel running in parallel with combat. Tehran is reportedly preparing a formal response to a U.S. proposal transmitted through intermediaries, even as public Iranian messaging continues to reject terms seen as requiring strategic surrender. That matters because it suggests neither side currently believes total escalation serves its near-term interests. Markets should read this as a narrow de-escalation window rather than a settlement signal: military pressure remains active precisely because negotiators are trying to improve leverage before any formal framework hardens.

Cyber activity remains one of the most underappreciated fronts. Iranian digital systems have already absorbed disruptive intrusions affecting public-facing applications and state-linked platforms, while U.S. and Israeli security officials continue warning that Iranian-aligned actors are likely to answer asymmetrically through cyber operations against softer Western targets, including infrastructure, contractors, logistics networks, and municipal

systems. Homeland security concern is less about catastrophic attack and more about cumulative disruption—low-cost intrusions that create public anxiety, consume response resources, and test domestic resilience.

The forward risk is that even if missile exchanges slow, proxy and irregular retaliation remain available to Tehran. Hezbollah attrition has reduced some immediate pressure on Israel's northern front, but Iran still has incentive to preserve escalation options outside its own territory if direct losses continue mounting. The most likely near-term pattern is controlled volatility: continued strikes, calibrated cyber pressure, and selective proxy activation, with all sides trying to avoid the single event that forces a broader regional commitment.



Here are presentations about uncomfortable truths and awkward questions.

Former news reporter for Fox News, Ken LaCorte, dives into the topics that others either dodge or dismiss – especially when they're true.

LaCorte spent 20 years behind-the-scenes at Fox News and now hosts the "Elephants in Rooms" YouTube channel.

I present here a synopsis of LaCorte's video presentations for your edification. I know you will find them very interesting.

D. Miyoshi

WILL DONALD TRUMP SURVIVE HIS SECOND TERM AS PRESIDENT?

Elephants in Rooms



According to this Elephantsinrooms YouTube video, Donald Trump's death risk is higher than you think.

Will Donald Trump survive his second term as president? I'm not talking about impeachment, but actual physical survival. After all, 18% of US presidents have died while in office.

And if Trump serves his full term, he'll be the oldest president ever. And not for nothing, people keep trying to kill him. The elephant in the room. What are the odds that a 78-year-old Donald Trump can survive being president four more years?

Ken LaCorte's video provides an insightful analysis of Donald Trump's potential survival during a second presidential term, balancing statistical longevity, personal health factors, and the unique protections and risks associated with the presidency. It effectively debunks the common misconception that presidential stress shortens life while highlighting the very real and significant threat of assassination, which is often underestimated. The discussion of Secret Service competence and the specific attempts on Trump's life adds a critical dimension to the overall risk assessment.

Donald Trump will likely survive a second term as president, despite his age and a significant risk of assassination, due to extensive presidential protection and the fact that presidents tend to live longer than their peers.

Synopsis

If Donald Trump serves a full second term, he would be the oldest president ever, starting at age 78, about six months older than Joe Biden was when sworn in.

A 78-year-old male has an average life expectancy of nine more years, to age 87, with a 75.3% chance of surviving the next four years.

Trump has already outlived the average American male life expectancy of 76.1 years.

Positive health factors for Trump include not smoking or drinking alcohol, and consistently reported good cardiac health, though presidential health reports can be politically influenced.

His parents both lived long lives, with his mother reaching 88

and his father 93, although his father was diagnosed with Alzheimer's in his 80s.

A significant health concern for Trump is his weight, with conflicting reports on his exact measurements.

The insurance industry's John Hancock calculator estimated Trump's average lifespan at 90 years.

Presidents benefit from extraordinary protection, including the Secret Service's human shields, advanced threat defense, armored vehicles, and comprehensive medical care, including a flying hospital on Air Force One.

The presidency also protects from common accidental causes of death, such as falls, through constant monitoring and standby services.

MAJOR INSIGHT: Contrary to the intuitive belief that presidential stress shortens life, a study by the American Medical Association found no evidence that presidents die sooner; in fact, they lived longer than their peers despite visible aging.

Assassination is a serious risk, with four presidents (9% of all who served) having been shot to death while in office.

Five serious assassination attempts against Trump's life are known, including incidents in Las Vegas (2016), North Dakota (2017), Butler, Pennsylvania (2024), at his golf course (2024), and a recent Iranian plot.

The Pennsylvania shooting raised concerns about Secret Service competence, leading to the director's resignation and questions about the effectiveness of increasing female agents.

Main Arguments

Trump's Statistical Survival Probability: Based on Social Security data, a 78-year-old male like Trump has an average life expectancy of nine more years to age 87, with a 75.3% chance of surviving a full four-year presidential term.

Presidential Protections vs. Risks: While presidents benefit from extraordinary medical care and Secret Service protection, the inherent risk of assassination remains a significant, difficult-to-quantify threat that outweighs many other factors.

Assassination as a Primary Risk Factor: Historically, 9% of all US presidents have been assassinated, and Donald Trump has faced at least five serious attempts on his life, making the threat of violence a critical factor in assessing his survival odds.

Unique Perspectives

MAJOR INSIGHT: Presidents Live Longer Despite Stress: Contrary to the common belief that the immense stress of the presidency causes leaders to age faster, a study by the American Medical Association found that presidents actually live longer than their peers, despite visible signs of aging.

Political Influence on Health Reporting: Official reports on presi-

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dental health are often unreliable due to political motivations, as evidenced by Trump's former physician's exaggerated claims and historical examples like FDR's concealed illness.

DEI Policies and Security Concerns: The video raises a controversial question about whether the Secret Service's drive to increase female agents, potentially influenced by DEI initiatives, might compromise the president's physical security, citing issues during a specific shooting incident.

Supporting Evidence

Longevity Factors for Trump: Trump benefits from positive health habits such as not smoking or drinking alcohol, and a strong family history of longevity, with his mother living to 88 and his father to 93.

Comprehensive Presidential Medical Care: The White House Medical Unit, established in 1945, provides 24/7 care from military physicians, and Air Force One functions as a flying hospital equipped with an operating room and a supply of the president's blood type.

Documented Assassination Attempts on Trump: Specific incidents include a 2016 attempt in Las Vegas, a 2017 forklift attack in North Dakota, a 2024 shooting in Butler, Pennsylvania, a golf course ambush, and an Iranian plot involving felons.

Thought-Provoking Questions

Quantifying the Assassination Threat: How can the unique and unpredictable nature of assassination attempts, especially given Trump's polarizing persona, be accurately factored into his overall survival probability?

Transparency of Presidential Health: To what extent should the public trust official reports on a president's health, given historical precedents of concealment and politically motivated statements from medical staff?

Balancing Security and Public Engagement: How can a president maintain necessary public visibility and engagement while mitigating the significantly increased risk of violence, particularly when their presence "riles people up"?

IS THIS TRUMPS GRAND STRATEGY FOR US DOMINANCE?



This video by renowned commentator Timcast offers an insightful analysis of Donald Trump's geopolitical strategy, interpreting seemingly disparate events as part of a cohesive plan to re-establish US unipolar dominance. Leveraging a detailed thread, the analysis connects the Ukraine conflict, actions in Syria and Venezuela, and the Middle Eastern energy shock to a broader strategy. This aims to control global energy supplies, weaponize the dollar, and secure the infrastructure for artificial intelligence development. The video argues these moves corner rivals like China and Russia, making allies dependent on US energy, thereby ensuring America's position at the top of the global power chart.

The video analyzes a theory suggesting **Donald Trump's foreign policy is a deliberate, multi-faceted strategy to re-establish the United States as the dominant unipolar global power by controlling energy, monetary systems, and future AI infrastructure.**

D. Miyoshi

Here is a summary of Timcast's comments

Donald Trump's actions on the world stage appear to be part of a plan to make the United States the dominant unipolar power, extending his "Make America Great Again" agenda beyond internal affairs.

Initially, Trump's plan might have focused on securing borders, bolstering Americans, and boosting manufacturing, but he quick-





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ly realized the US was being displaced globally by rival economic systems threatening the petrodollar.

The liberal economic order, established after WWII to prevent further world wars by locking countries into trade, is seen as failing to dominate all nations without "bribing" them into the system.

Tucker Carlson's view of the "new world order" suggests the US should shrink and share power with countries like China, Russia, and Iran, a concept potentially pursued by Barack Obama.

A detailed thread by "10 Delta on X" outlines Trump's "world domination plan," which involves seizing global oil spigots and neutralizing supply chains outside the dollar system.

The Ukraine conflict served as a justification for sanctions that collapsed Russian pipeline gas, leading to the destruction of Nordstream and rewiring Europe's energy system to be dependent on US LNG.

The US went from supplying 28% of Europe's LNG in 2021 to 58% in 2025, transforming Europe into a captive market purchasing survival in USD.

The fall of Assad in Syria severed a critical node for China's Belt and Road Initiative, destroying the trilateral railway linking Iran, Iraq, and Syria, thereby isolating Iran.

In January, the US effectively took control of Venezuela's heavy crude reserves, positioning Gulf Coast refineries to process hundreds of thousands of barrels daily and solidifying the US as a dominant refined petroleum exporter.

Venezuela and Iran, major oil supply channels outside the dollar system, producing heavy crude for China and evading US financial supervision, are being neutralized within 90 days.

Israel's strike on Iran's South Pars gas field and Iran's retaliation against Qatar's LNG facility have closed the Strait of Hormuz, causing European gas prices to spike and leaving the US as the only scaled supplier.

If Iran falls under US influence, roughly 40-45 million barrels per day of global production would be under US control, making OPEC irrelevant and solidifying the petrodollar into a hybrid pro-LNG dollar.

The new system relies on American crude and gas from the Gulf Coast, with no comparable alternative supplier, locking buyers into long-term contracts and US energy dependence for decades.

Major Insight: The ultimate goal of this grand strategy is to control energy corridors, which in turn controls the monetary system, and simultaneously controls the compute infrastructure necessary for building artificial super intelligence, with the US actively seizing all three.

The US is systematically degrading China's ability to power data centers and fabricate semiconductors by choking the Strait of Hormuz and crippling Middle Eastern LNG and helium production, as China is import-dependent while the US is energy self-sufficient.

A post-war Iran under US influence would compete directly with Russia for refineries in China and India at lower costs, further cornering Russia and dismantling its economic lifeline.

The collateral damage, including temporary inflation and higher gas prices for Americans, is deemed an acceptable cost by the architects of the US empire to counter the rise of China and Chinese ASI.

Timcast believes Trump has forced the "deep state" to reverse course from a multipolar world vision, aiming to restore America's unipolar dominance by controlling global trade routes and energy infrastructure.

Trump's efforts in Venezuela, Panama, Greenland, and the Abraham Accords are seen as moves to control global trade routes and energy infrastructure, forcing the rest of the world to fall in line.

If Trump succeeds in Iran, the last and most difficult piece, the rest of the world will likely fall into "Trump's world order," leading to "cheap things, free energy, cheap labor" for America.

Main Arguments

Trump's Unipolar Dominance Plan: Donald Trump's geopolitical strategy is analyzed as an effort to restore the United States as the sole dominant unipolar power globally, extending beyond internal "Make America Great Again" goals to encompass world domination.

Energy Dominance as Core Strategy: The central thesis of Trump's "final move" is to seize global oil and gas supply chains, neutralizing any system outside the dollar, to achieve complete energy dominance and solidify the US's hegemonic position.

Weaponization of the Dollar through Energy: The US is strategically leveraging its control over energy supply to force global reliance on the dollar, compelling countries to liquidate precious metals and cryptocurrencies to purchase American energy in US currency.

Control of AI Compute Infrastructure: The US grand strategy extends to systematically degrading China's ability to power data centers and fabricate semiconductors at scale by crippling Middle Eastern LNG and helium production, thereby controlling the future of Artificial Intelligence.

Unique Perspectives

Major Insight: Democrats' "New World Order" vs. Trump's Reversal: The speaker suggests that previous administrations (Obama, Clinton) and elites might have sought a multipolar world, potentially off-shoring wealth to China to avoid a major conflict, while Trump is actively forcing a reversal to re-establish US unipolar hegemony.

Israel as a US Military Asset: Israel's role in the Middle East is presented not primarily through its own ideological lens, but as an effective "forward military base and weapons manufacturer" for the United States, serving broader American interests.

Post-WWII Economic Strategy Replicated: Trump's current geopolitical maneuvers are likened to the post-World War II economic boom, where the decimation of other nations' industries led to their dependency on buying from the US, suggesting a deliberate re-creation of this economic leverage.



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Supporting Evidence

European Energy System Rewiring: The Ukraine conflict and the destruction of Nordstream pipelines are cited as events that rewired Europe's energy system, increasing US liquid natural gas (LNG) supply to Europe from 28% to 58% and transforming Europe into a captive market for US energy priced in USD.

Venezuela's Heavy Crude Reserves Secured: The US effectively took control of Venezuela's vast heavy crude reserves, positioning Gulf Coast refineries to process this oil and solidifying the US as a dominant exporter of refined petroleum products, neutralizing a major oil channel outside the dollar system.

Middle East Energy Supply Disruption: Strikes on Iran's South Pars gas field and Qatar's Ross Leafan LNG facility crippled global supply, closed the Strait of Hormuz, and caused significant spikes in gas prices, leaving the United States as the only remaining scaled energy supplier.

Global Market Shift to Dollar: The DXY (US Dollar Index) increased from 96 to 101, while gold and Bitcoin saw significant drops, indicating that European and Asian institutions are liquidating precious metals and crypto to acquire dollars needed to purchase the now-dominant American energy supply.

Thought-Provoking Questions

Trump's Urgency and "Last Opportunity": The analysis raises the question of whether Trump's aggressive geopolitical actions are driven by a perception that this is his final opportunity to solidify US unipolar dominance before potential political shifts could undermine his plan.

Acceptable Collateral Damage for Empire: The video prompts consideration of whether temporary inflation, higher gas prices, and regional instability are deemed acceptable collateral damage by the architects of US foreign policy in pursuit of global energy, monetary, and AI dominance.



WILL AMERICA LOSE THE WAR AGAINST IRAN?



The video by Grace Digital Network offers an insightful analysis by juxtaposing Professor Jiang's geopolitical predictions of a US loss in an Iran war with ancient biblical prophecies. It compellingly argues that Jiang's game theory, predicting US systemic exhaustion via economic warfare through the Strait of Hormuz, aligns surprisingly with Ezekiel's prophecy of Persia (Iran) as a latter-day enemy of Israel. The conspicuous absence of America in these prophecies, coupled with Jiang's forecast of US decline, creates a thought-provoking convergence, suggesting a potential shift in global power dynamics.

Professor Jiang predicts the US will lose an Iran war through economic and psychological attrition, a prophecy potentially echoed by biblical texts that name Persia (Iran) as a latter-day enemy of Israel while conspicuously omitting America, suggesting a future decline in US global power.

While Professor Jiang's thesis is well thought out, we should note his background. Professor Jiang is not a real professor but an educator who along with his parents emigrated from China to the US at the age of 6. He went to Yale and received a bachelor's degree in English literature. He then became a reporter and went to China to cover events. He was arrested there and ousted from the country. But later he seemed to change his political views and moved to Beijing, where he now produces YouTube videos on geopolitical topics. This is unusual because very few foreigners in China are allowed to broadcast YouTube videos from the country. This is the background we need to keep in mind when we listen to his geopolitical views.

D. Miyoshi

Summary of Jiang Video

In 2024, Professor Jiang Schuin made three predictions: Donald Trump would win the presidential election, Trump would start a



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war with Iran, and the United States would lose that war, shifting the global order.

The first two predictions, Trump winning and the US starting a war with Iran (Operation Epic Fury on February 28th, 2026), came true with "stunning, undeniable accuracy."

Professor Jiang, who hosts "Predictive History," uses game theory and historical patterns to forecast geopolitical events, not insider information.

Operation Epic Fury was initially overwhelming, striking hundreds of targets, destroying missile sites, achieving air superiority, and killing Iran's supreme leader within days.

Major Insight: Professor Jiang argues that wars are not won in the opening phase but in the phase that follows, where technology gives way to endurance and firepower to logistics, making it a war of attrition.

Iran's strategy is not to defeat the US military directly but to exhaust the American system economically, politically, and psychologically until the cost of continuing outweighs the cost of withdrawing.

Iran has been preparing for this conflict for over 20 years, driven by an "eschatological" (religious) motivation, viewing it as a struggle against the "great Satan."

Iran developed a network of proxies like Hezbollah and Hamas, which served as a "dress rehearsal" for assessing Western military responses.

Iran's greatest strategic asset is its proxy network, designed to create multiple simultaneous pressure points that the US cannot address with air strikes alone.

Major Insight: Jiang argues Iran is waging war against the global economic system that sustains the United States, with the most vulnerable point being the Gulf Cooperation Council countries and the Strait of Hormuz.

The Strait of Hormuz is the single most strategically important choke point globally, with 21 million barrels of crude oil (20-21% of world's daily consumption) passing through it daily.

Iran controls the entire northern shore of the Strait of Hormuz and can disrupt traffic with cheap drones and ballistic missiles, causing immediate global oil price spikes and economic chaos.

The mere credible threat of attack can shut down the Strait, as shipping companies will not risk vessels without insurance coverage.

Jiang argues that air power alone has never achieved regime change in a large, motivated, geographically defensible nation like Iran, which has 80 million people and mountainous terrain.

The refusal of the Secretary of War to rule out ground troops suggests the administration knows air power may fail, leading to pressure from Gulf states to escalate.

Jiang compares the situation to Napoleon's invasion of Russia, warning that empires often believe victory is inevitable until it isn't.

The video transitions to biblical prophecy, emphasizing "no date setting" and "scripture over headlines."

The prophet Ezekiel, writing 2,600 years ago, named Persia (modern-day Iran) as part of a coalition of nations that would form against Israel in the latter days.

Major Insight: When Ezekiel wrote this prophecy, Persia was not Israel's enemy but was about to become its "greatest gentile deliverer" under Cyrus the Great, who freed the Jewish people and funded the rebuilding of the temple.

The 1979 Islamic Revolution transformed Persia from a nation with diplomatic ties to Israel into its most hostile state actor, fulfilling Ezekiel's prophecy of Persia becoming an enemy.

Major Insight: The Bible conspicuously does not name America, the most powerful nation in the modern world, in these prophetic texts, which "begins to make a different kind of sense" if Professor Jiang's prediction of American power decline is correct.

Main Arguments

Professor Jiang's Three Predictions: Professor Jiang Schuin, a Beijing-based geopolitical analyst, made three predictions in 2024: Donald Trump would win the presidential election (which happened), Trump would start a war with Iran (Operation Epic Fury on Feb 28, 2026, which happened), and the United States would lose that war, permanently shifting the global order.

War of Attrition, Not Conventional Victory: Professor Jiang argues that the US-Iran conflict is a war of attrition, where victory goes to the side that can sustain losses and fight longer, not necessarily the one with superior technology or firepower.

Iran's Strategy: Systemic Exhaustion of the US: Iran's war strategy is designed to exhaust the American system economically, politically, and psychologically, rather than directly defeating the US military, until the cost of continuing the war outweighs the cost of withdrawing.

Economic Warfare via Strait of Hormuz: Jiang posits that Iran is waging war against the global economic system that sustains the United States, with the most vulnerable point being the Gulf Cooperation Council countries and the Strait of Hormuz.

Unique Perspectives

Major Insight: Persia's Prophetic Reversal: The prophet Ezekiel, writing 2,600 years ago when Persia (modern-day Iran) was about to become Israel's liberator (under Cyrus the Great, who was called God's "anointed" or Messiah), prophesied that Persia would one day march against the very nation it once saved. This is a divine foreknowledge of a reversal that contradicted all observable trends of Ezekiel's era.

Iran's Eschatological Motivation: Professor Jiang highlights Iran's ideological motivation, framing the conflict as an eschatological struggle against the "Great Satan" (US/Israel), which provides a depth of motivation that transcends political cycles, economic pressures, and casualty counts.

America's Absence in Biblical Prophecy: The Bible, while



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naming many nations in the latter-days coalition against Israel (including Persia), conspicuously omits America, the most powerful nation in the modern world. This absence gains a different kind of sense if Professor Jiang's prediction of American power decline and military pullback from the region is correct.

Supporting Evidence

Iran's 20-Year Preparation: Professor Jiang asserts that Iran has been preparing for this specific conflict for over 20 years, including developing its proxy network (Hezbollah, Hamas), testing tactics in conflicts like the June 2025 engagement with Israel/America (a "dress rehearsal"), and using 8 months of specific preparation (June 2025-Feb 2026) to disperse assets and harden infrastructure.

Strait of Hormuz: Global Choke Point: The Strait of Hormuz is the single most strategically important choke point on Earth, with approximately 21 million barrels of crude oil (20-21% of total daily consumption) passing through it daily. Iran controls the entire northern shore, allowing it to disrupt global oil and LNG markets with cheap drones and missiles, causing immediate economic chaos.

Air Power Insufficient for Regime Change: Historically, air power alone has never achieved regime change in a large, motivated, geographically defensible nation like Iran (80 million people, mountainous terrain). This suggests a potential need for ground troops, which would be catastrophically costly and politically unacceptable, creating a "trap" for the US.

Thought-Provoking Questions

The "Trap" of Escalation: Professor Jiang describes a trap where the US, unable to achieve regime change with air power, faces pressure from its Gulf allies (who are being targeted by Iranian proxies) to deploy ground troops, despite the catastrophic costs, because admitting air power failure is politically unacceptable.

Convergence of Game Theory and Prophecy: The video highlights the unsettling convergence of a modern geopolitical analyst's predictions (US decline, Iran war) and ancient biblical prophecy (Persia as a latter-days enemy of Israel), raising questions about the nature of foresight and the future trajectory of global events.

WHY CALIFORNIA IS DIFFERENT FROM OTHER STATES



The video by Fact Atlas provides a highly effective explanation of why California stands as a unique and influential entity within the United States. It thoroughly details the historical, geographical, economic, and cultural factors that have allowed California to operate independently and often set national precedents. By highlighting its rapid gold rush-fueled growth, immense economic power, diverse landscape, and significant immigration, the video clearly articulates how California's distinctiveness enables it to act as a "laboratory of democracy" that previews America's future, despite recent challenges to its regulatory autonomy.

California stands apart from other U.S. states due to its unique history of rapid growth, diverse geography, immense economic power, and high immigration, which collectively enable it to independently set national standards and often preview America's future trajectory.

D. Miyoshi

Summary of video:

California's unique crescent shape defies the neat geometry of other Western states.

Unlike other states that filled gradually, California's population exploded in months due to the 1848 gold rush, reaching statehood in just two years.

This rapid, transient-driven growth fostered a culture of risk-taking, reinvention, and unusual openness to new ideas and outsiders.

California's willingness to break federal rules stemmed from its founding culture, built by people who had already defied convention.

By the 1960s, Los Angeles faced an extinction-level crisis with some of the worst air quality on Earth, leading the state to enact its own vehicle emission standards.

In 1970, Congress granted California a permanent exemption under the Clean Air Act (Section 209B) to set stricter emission standards.



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Section 177 of the Clean Air Act allowed other states to adopt California's standards, leading 13 states plus D.C. (40% of the car market) to do so.

Automakers chose to build all vehicles to California's specifications rather than two versions, effectively making California's rules national.

Major Insight: California discovered a powerful strategy: it doesn't need to pass federal law if its market power can make federal law irrelevant.

California's GDP reached \$4.3 trillion in 2025, making it the world's fifth-largest economy, surpassing entire nations like the UK, France, and India.

The state's economy is growing faster than the United States, China, and Germany, narrowing the gap with larger global economies.

California's extreme geographic diversity, from Death Valley to Mount Whitney, and various ecosystems, created unparalleled economic diversity.

This economic diversity allowed California to absorb shocks that would have flattened specialized economies, with regions excelling in agriculture, technology, entertainment, and aerospace.

California's economy is significantly boosted by immigration, with 27% of its population being immigrants, more than double the national average.

Immigration creates a continuous talent pipeline and professional networks, attracting more immigrants and companies to the state.

In February 2025, the Senate voted to revoke California's vehicle emissions waivers, marking an unprecedented challenge to its regulatory autonomy.

This challenge threatens the model of states as "laboratories of democracy," potentially allowing other states to impose policies nationally.

Sociologist Manuel Pastor described California as "America only sooner," as its progressive legislation often previews national changes years or decades later.

California has pioneered legislation in areas like minimum wage, environmental protection, LGBTQ+ rights, privacy laws, and cannabis legalization, which have subsequently spread.

California's "opposite status" is not opposition but rather direction, as it previews the American trajectory.

Core Concepts

California's Unique Founding Psychology: Unlike other states that filled gradually, California's rapid population explosion during the 1848 gold rush created a culture built on transients, risk-taking, and reinvention, fostering an unusual openness to new ideas and a willingness to defy convention.

Regulatory Autonomy and Influence: California was granted a permanent exemption under the Clean Air Act (Section 209B) to set stricter vehicle emission standards, and Section 177 allows

other states to adopt these, effectively making California's rules a de facto national standard for the automotive industry.

Global Economic Powerhouse: California's GDP reached \$4.3 trillion in 2025, making it the world's fifth-largest economy, surpassing entire nations like the United Kingdom, France, and India, and giving it immense leverage over global companies.

Geographic Diversity as Economic Resilience: The state's unparalleled range of ecosystems, from Death Valley to Mount Whitney, fostered economic diversity across agriculture, technology, entertainment, and trade, preventing single-industry collapses common in other regions.

Immigration as a Talent Pipeline: With 27% of its population being immigrants (10.9 million people), California benefits from a continuous influx of talent, creating self-sustaining networks that replenish its workforce and fuel its diverse economy.

Breakthrough Ideas

Idea 1: Regulatory Tail Wags the National Dog: California discovered it doesn't need to pass federal law if its market is large enough to make federal law irrelevant. Automakers choose to build all vehicles to California's stricter standards because its market, combined with other adopting states, represents 40% of the American car market, making it more cost-effective than producing two versions.

Idea 2: America's Only Sooner: California functions as a "laboratory of democracy," pioneering progressive legislation (e.g., minimum wage, environmental protection, LGBTQ+ rights, privacy laws, cannabis legalization) that is later studied, copied, and adopted by other states, effectively previewing America's future trajectory.]

Key Connections

Founding Culture to Regulatory Defiance: California's gold rush-era culture of risk-taking and breaking conventions directly led to its willingness to enact its own vehicle emission standards in the 1960s when facing an environmental crisis, rather than waiting for federal action.

Economic Scale Drives Compliance: The state's status as the world's fifth-largest economy means that companies seeking access to its 40 million consumers and \$4.3 trillion market choose to comply with California's regulations rather than negotiate or build separate products.

Geography and Economic Resilience: California's unique geographic diversity, encompassing nearly every American ecosystem, enabled the development of multiple robust industries, allowing the state to absorb economic shocks that would devastate specialized economies.

Immigration Fuels Economic Dynamism: The continuous flow of immigrants, particularly skilled talent from Asia and Latin America, creates a feedback loop that constantly replenishes California's workforce, sustaining its economic growth and innovation across various sectors.



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Practical Applications

Understanding National Policy Influence: Recognize that state-level actions, especially from economically powerful states like California, can effectively set national or even global standards for industries without formal federal legislation.

Lessons in Economic Diversification: Regions can learn from California's model that fostering a diverse economic base, often supported by geographic advantages, can build resilience against industry downturns and promote sustained growth.

Leveraging Immigration for Growth: Policymakers can observe how California's high immigration rates contribute to a dynamic talent pipeline and economic expansion, highlighting the benefits of welcoming and integrating diverse populations.

Anticipating Future Policy Trends: By monitoring legislative and social innovations in California, individuals and organizations can gain insights into potential future national policies and societal shifts, as California often acts as a precursor.

WHY CHARLIE HAD TO BE ELIMINATED!



This YouTube synopsis of the Common Sense Show on Oct 1, 2025, presents conservative commentator Dave Hodges' thesis that Charlie Kirk had to be eliminated because he was a unifier. Hodges propounds that Kirk was "eliminated" because, like other historical figures such as JFK, RFK, and MLK, he was a unifier, and intelligence agencies target those who unify people, as it disrupts their "divide and conquer" strategies. It should be noted that Hodges is one of the most experienced investigators of the JFK assassination case.

Here is my synopsis of the YouTube program. I hope you find it informative.

D. Miyoshi

Hodges' Main Arguments

[Intel Agencies and Divide and Conquer]: Intel agencies like the CIA, FSB, MSAD, and MI6, despite potential conflicts between countries, often work together to divide and conquer, serving those who provide them with unlimited funding. They identify points of contention within a country or group and exacerbate them to prevent unification, often for the purpose of exploiting natural resources.

[Historical Examples of Targeting Unifiers]: Figures like Fred Hampton, RFK, JFK, and MLK were targeted because they were unifying people across different lines, which threatened the established powers that rely on division to maintain control.

[Charlie as a Unifier]: Charlie Kirk was unifying people by addressing liberal viewpoints in a non-aggressive manner, which made him a target.

[Conspiracy Theories as Chaff]: After an "intel hit," multiple conspiracy theories are often created to distract people and draw attention away from the truth, similar to how an F-35 releases chaff to evade pursuers.

Unique Perspectives

MAJOR INSIGHT: [Intel Agencies Don't Serve Countries]: Hodges argues that intelligence agencies, despite performing some perfunctory duties for their countries, primarily serve those who provide them with unlimited funding, allowing them to operate above the law and pursue their own agendas.

[MI6 as the Head of the Snake]: Hodges identifies MI6 as the leading intelligence agency, suggesting a hierarchy within the global intelligence community.

Supporting Evidence

[Fred Hampton and the Rainbow Coalition]: Fred Hampton's Rainbow Coalition, which brought together poor people of different ethnicities, was shut down by the FBI, highlighting the suppression of unification efforts.

[RFK's Assassination]: RFK, who built coalitions and spoke out against the Vietnam War and promised to reopen his brother's assassination investigation, was assassinated under suspicious circumstances after winning the California primary.

[JFK's Efforts to Unify]: JFK attempted to unify people through civil rights initiatives and by negotiating with Khrushchev to limit nuclear weapons testing, which threatened the defense industry's profits.

[MLK's Message of Unity]: MLK's message of peace, love, and unity helped prevent race riots, but he was assassinated after the FBI withdrew his protection.

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Thought-Provoking Questions

[Turning Point USA's Future]: Hodges raises questions about the future direction of Turning Point USA following Charlie's death, particularly regarding who they will accept money from. This is a critical point.

Top Questions

According to Hodges, why was Charlie eliminated?

According to Hodges, Charlie was a unifier, and this quality led to his elimination. He suggests that intelligence agencies target those who unify people, using a 'divide and conquer' strategy. It's also speculated that Charlie's death might have been a warning to Trump due to his stance against globalist entities.

Whom do intelligence agencies truly serve?

Hodges asserts that intelligence agencies do not primarily serve their respective countries, despite some perfunctory duties. Instead, they serve those who provide them with unlimited funding, allowing them to operate outside the law to achieve their goals. The head of the snake is MI6.

How does the “divide and conquer” strategy work?

Hodges explains that intelligence agencies use the 'divide and conquer' strategy by identifying points of contention within a country or group, such as tribal differences in Africa, and then exacerbating those conflicts. This prevents unification and allows them to control and exploit resources or achieve other objectives. This strategy has also been used historically within the United States.

What historical figures are mentioned as examples of unifiers who faced opposition?

Hodges mentions several historical figures who attempted to unify people and faced opposition, including Fred Hampton, who created the Rainbow Coalition; Robert F. Kennedy, who built coalitions and opposed the Vietnam War; John F. Kennedy, who sought peace with the Soviet Union and civil rights; and Martin Luther King Jr., who advocated for peace and unity.

How does Hodges characterize Charlie Kirk's death, and what tactics are associated with it?

Hodges suggests that Charlie's death was an 'intel hit,' characterized by the spread of false information and multiple conspiracy theories designed to distract from the truth. This is compared to an F-35 releasing chaff to evade a pursuing plane, with the conspiracy theories serving to draw attention away from the real issue. Hodges also draws parallels to similar tactics used in the JFK assassination.

WHY CHINA CAN'T INVADE TAIWAN



Many people believe that China will soon invade Taiwan. But in this video transcript summary, geopolitical expert Paul Warburg argues China will not invade Taiwan, now or in the future. This is because most people misunderstand the strategic realities, hard data, and internal vulnerabilities that make a full-scale Chinese invasion or blockade of Taiwan highly unlikely and militarily impossible in the near future.

Summary

The threat of China attacking Taiwan has been discussed for decades, raising worries about a potential World War II-scale event due to Taiwan's critical role in semiconductor production.

Taiwan produces most of the semiconductors essential for modern society, from cell phones to farm equipment, making its strategic importance global.

Despite decades of threats, China has not attacked Taiwan, suggesting underlying factors have prevented it, which have not significantly changed.

China's primary goal is internal control, not external conquests, making internal stability a higher priority than invading Taiwan.

Major Insight: Threatening an invasion of Taiwan benefits China's internal politics far more than actually carrying out the invasion, as the threat reaps continuous benefits while the action would only result in costs.

Russia's invasion of Ukraine makes a Chinese invasion of Taiwan less likely, as China has observed how a smaller country



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with defensive advantages and modern technology can effectively defend against a larger opponent.

A Chinese invasion of Taiwan would be a naval invasion, presenting significant challenges due to Taiwan's particular geography with limited landing beaches that are easily fortifiable.

Modern technology, including satellites and advanced military intelligence, means Taiwan would instantly detect Chinese ships leaving the coast and could retaliate immediately with long-range missiles.

Taiwan's ability to use anti-aircraft missiles on its small island would likely prevent China from effectively parachuting troops behind lines, unlike historical invasions like D-Day.

China's current amphibious landing capacity is limited to about 25,000 troops in a single wave, which Taiwan could likely handle, and subsequent waves would be smaller due to losses.

War games suggest China would need 200,000 to 400,000 troops for a successful initial landing, far exceeding its current capacity, and then face immense logistical challenges to sustain them.

The involvement of allies like the United States, Philippines, Vietnam, Japan, or South Korea would further complicate Chinese supply lines and naval operations.

China's rate of producing large landing craft (a couple dozen annually) is insufficient to keep pace with potential combat losses, which could decimate them in hours.

Estimates of China being ready to attack by 2025 or 2027 often stem from political statements like Xi Jinping's directives, rather than actual military capabilities and hardware realities.

A Chinese naval blockade of Taiwan, while more achievable than an amphibious assault, is still unlikely because China itself is highly vulnerable to a counter-blockade.

China is heavily dependent on energy imports (coal, oil) to run its massive industrial capacity, and its main energy trade routes, particularly the Straits of Malacca, are easily blockaded.

China's small navy would be incapable of simultaneously blockading Taiwan and fighting a counter-blockade at the Straits of Malacca.

Internal challenges within China, including economic problems,

ballooning national debt, and a rapidly declining population with many single sons, make a costly war highly destabilizing.

Sending single sons to combat, where they might die, would be a destabilizing event in Chinese culture, impacting the care of aging parents and potentially leading to internal unrest.

China faces significant internal cohesion issues with ethnic groups like those in Hong Kong, Tibet, and Xinjiang, which could boil over if the state is weakened by external war.

External opponents like India, with whom China has territorial disputes, or Southeast Asian countries concerned about water control, could exploit China's weakness during a Taiwan invasion.

If China were to succeed in taking Taiwan, it would gain little of value, as Taiwan's critical semiconductor fabs (like TSMC) would likely be destroyed or sabotaged during the conflict.

The destruction or sabotage of TSMC fabs is part of Taiwan's deterrent strategy, ensuring China gains no economic value from an invasion.

China continually threatens Taiwan as part of its national mythology and narrative of unifying historical China, which serves internal political interests without requiring actual military action.

The Chinese Communist Party can be patient with this objective, continually talking about preparations without actually taking action, and the Chinese people generally accept this.

China's military buildup and threats might also be a diversion for a different military target, such as Siberia (Outer Manchuria), which presents fewer downsides and more upsides for China.

The biggest legitimate threat to Taiwan is not military invasion or naval blockade, but rather propaganda aimed at influencing the minds and political narratives of the Taiwanese people to become more pro-China.

Conclusion

Insightful Analysis

Warburg offers an insightful analysis, meticulously dissecting why a Chinese invasion of Taiwan is militarily unfeasible and strategically counterproductive for China. He effectively uses hard data and geopolitical realities, such as China's limited am-



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phibious capacity, Taiwan's defensive advantages with modern technology, and China's extreme vulnerability to a counter-blockade of its energy imports. His analysis highlights that China's internal stability issues and the lack of tangible gains from a successful invasion further diminish the likelihood, concluding that the threat itself serves China's internal political narrative more than any actual military action would.

WHY DIDN'T CHINA AND RUSSIA HELP IRAN?



This video by The War Archive provides a well-explained analysis of why Russia and China would not militarily assist Iran in a hypothetical conflict. It clearly articulates the crucial distinction between strategic partnerships and formal alliances, emphasizing that mutual defense obligations were never in place. The explanation is supported by specific examples of Russia's cautious foreign policy and China's trade-focused approach, alongside their respective military limitations and overriding economic interests, making a compelling case for their non-intervention.

Russia and China did not militarily intervene to help Iran because their relationships were strategic partnerships, not formal alliances with mutual defense treaties, and their own national interests and military limitations outweighed the risks of direct confrontation with the US and Israel.

Summary of Video

Before a hypothetical dawn attack by American and Israeli aircraft on Iran, analysts believed Iran would not face such a moment alone, expecting Russia and China to defend their partner.

The "axis of upheaval" referred to a loose alignment between Russia, China, Iran, and North Korea, all challenging Western

dominance.

Military cooperation, such as Russian forces using Iranian drones in Ukraine and joint naval exercises, reinforced the perception of a new geopolitical bloc.

Major Insight: The idea of an "axis" rested on a dangerous misunderstanding: "Cooperation between nations does not automatically mean they will fight for one another," highlighting the critical difference between partners and allies.

Alliances create obligations through mutual defense treaties (like NATO's Article 5), whereas Russia, China, and Iran share a looser "strategic alignment" where they cooperate only when interests overlap.

Iran's strategic position, overlooking important energy routes and the Strait of Hormuz, made it appear a valuable partner for powers challenging Western influence.

Russia's strategic mindset shows a willingness to cooperate against the West, but a cautious approach to military intervention when costs are high, as seen with Armenia and Syria.

Despite growing military cooperation with Iran, including drone transfers after the Ukraine invasion, Russia's response to the hypothetical attack was limited to strong diplomatic condemnation.

Russia's military was already deeply entangled in Ukraine, and projecting significant power 3,000 km to Iran would have been logistically unsustainable and risked jeopardizing delicate relationships with Gulf energy producers.

China's foreign policy follows a consistent rule: it does not go to war for other countries, preferring to expand influence through trade, investment, and economic partnerships.

While China had close economic ties with Iran, including oil exports and the Belt and Road Initiative, Iran was only one piece of China's much larger web of economic and strategic interests in the Middle East.

Nearly half of China's imported oil originates from the Persian Gulf, and Iran's threats to the Strait of Hormuz would have severely impacted China's economy, making intervention a dangerous gamble.

In the end, Iran's isolation was due to a misunderstanding of its relationships; Russia and China prioritized their own national interests and avoided direct confrontation with the US and its allies.

Main Arguments

Misunderstanding of "Axis of Upheaval": The perceived "axis of upheaval" (Russia, China, Iran, North Korea) was based on a dangerous misunderstanding that cooperation between nations automatically means they will fight for one another.

Partners vs. Allies Distinction: The crucial difference between "partners" (cooperating where interests overlap) and "allies" (bound by mutual defense treaties like NATO's Article 5) explains why Russia and China did not intervene militarily for Iran.

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Russia's Strategic Restraint: Moscow's strategic mindset prioritizes restraint over direct confrontation with the West when the cost of defending partners becomes too high, especially while deeply entangled in the Ukraine war.

China's Non-Intervention Doctrine: Beijing consistently adheres to a foreign policy rule of not going to war for other countries, preferring to expand influence through trade and investment rather than costly military commitments.

Unique Perspectives

Insight 1: Cooperation is not Commitment: The fundamental distinction between nations cooperating for shared interests (strategic alignment) and being committed to mutual defense (formal alliances with obligations) is critical. This reveals that the "axis of upheaval" was a loose grouping, not a military bloc.

Russia's Military Limitations: Despite a growing partnership with Iran, Russia's deep entanglement in the Ukraine war and significant logistical challenges (3,000 km distance, lack of forward bases) made meaningful military intervention in Iran nearly impossible to sustain.

Insight 2: Iran's Strategic Value vs. China's Broader Interests: While Iran's geographic position and oil exports were valuable, China's broader energy security and economic interests across the entire Persian Gulf (including major suppliers like Saudi Arabia, UAE, and Qatar) meant Iran's survival was not worth jeopardizing those larger relationships.

Supporting Evidence

"Axis of Upheaval" Indicators: The perception of an "axis" was reinforced by military cooperation (Iranian drones for Russia in Ukraine, joint naval exercises) and diplomatic coordination among Russia, China, Iran, and North Korea.

Russia's History of Caution: Russia's passive response to Azerbaijan's offensive in Nagorno-Karabakh against Armenia and its reluctance to deepen military commitment in the Syrian civil war demonstrate a consistent pattern of prioritizing restraint.

China's Economic Ties to Gulf States: Nearly half of China's imported oil originates from the Persian Gulf, with Saudi Arabia, UAE, and Qatar collectively exporting far more oil and gas to China than Iran, alongside massive Chinese investments in these states.

Thought-Provoking Questions

The True Nature of Modern Geopolitical Groupings: How should observers interpret "partnerships" and "alignments" in a multipolar world where traditional treaty-based alliances are less common, and national interests often outweigh perceived loyalty?

The Limits of Strategic Geography: To what extent does a country's strategic geographic position guarantee its security or the support of its partners if those partners have more pressing, diversified interests elsewhere?

Why Financial Conditions in 2026 Will Lead to War



This YouTube video released in January 2026 offers an insightful analysis, meticulously connecting historical patterns of financial collapse and geopolitical tension to current global economic indicators and political decisions. The creator presents a compelling argument that the 2026 financial crisis, driven by unsustainable debt and the weaponization of currency, is not merely an economic downturn but a direct precursor to global military conflict, echoing the conditions before World War I and II. The detailed breakdown of the "maturity wall" and the strategic implications of de-dollarization provide a stark and alarming prediction for the near future.

Main Arguments

Wars are Financial Tragedies, Not Random Events: The conventional narrative of wars starting from isolated incidents (like an assassination) is a lie; wars are the final act of financial tragedies, born from unsustainable debt, collapsing currencies, and economic strangulation years prior.

The 2026 Financial Crisis is a Pre-War Era Trigger: Current global economic indicators in January 2026, including unprecedented debt levels and geopolitical realignments, mirror the precise warning signs that preceded World War I and II, indicating an imminent global military conflict.

Governments Choose War to Erase Debt and Maintain Control: When faced with mathematically impossible debt, governments avoid austerity or outright default by choosing inflation and war,

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which justifies printing unlimited money, seizing emergency powers, and erasing debts owed to "enemies."

Summary

Wars are not random events caused by madmen, but rather the final act of a financial tragedy written years earlier in central bank ledgers and bond markets.

War doesn't start when soldiers cross borders; it starts when the money dies.

War begins when government debt becomes mathematically impossible to repay, global trade fractures, and desperate politicians need a foreign enemy to divert their furious citizens.

As of January 2026, the global economy is actively imploding, with the US debt exceeding \$38 trillion, China's real estate sector collapsing, and trust in the US dollar shattering.

The current situation mirrors the "pre-war era" of 1914 and 1939, where global financial systems buckled under imperial debt and trade wars, leading to widespread conflict and millions of deaths.

All historical warning signs are flashing red, but with debt 10 times larger, weapons a thousand times more destructive, and mistakes happening at internet speed.

The 1914 pattern involved the British Empire using financial weapons to strangle a rising Germany, leading Germany to conclude that war was its only option for survival.

Banks in London, Paris, and New York exacerbated the situation by loaning massive amounts to European governments, creating alliances and obligations that forced countries into war to protect their investments.

Today's parallel sees the US as the established power, China as the rising power, the US dollar system replacing the gold standard, and semiconductor supply chains as the new colonial trade routes.

The world is currently in the largest debt bubble in human history, with global debt crossing \$320 trillion by the end of 2025, more than 340% of global GDP.

Governments facing impossible debt have three choices: austerity (leading to riots), default (crashing the global banking system), or inflation and war.

War is often chosen because it justifies unlimited money printing, government control, rationing, censorship, and allows for the erasure of debts owed to enemy nations, such as the US owing China \$1.1 trillion.

Recent events in the last 30 days (January 2026) include China, Japan, and Saudi Arabia dumping US treasuries, the 10-year Treasury yield hitting a 17-year high, the US discussing taking Greenland, and China and Russia forming a formal military alliance.

The US weaponized the dollar by freezing \$300 billion of Russia's central bank reserves in February 2022, shattering global trust and accelerating de-dollarization efforts through systems like CIPS, SPFS, and BRICS Pay.

Financial sanctions are a form of siege warfare, backing nations into a corner and historically leading to desperate military action, as seen with Japan in 1941.

China faces a simultaneous collapse of its economy and population, with its real estate market imploding and its population shrinking rapidly, threatening the Communist Party's legitimacy.

Taking Taiwan, which controls over 90% of advanced semiconductor production, becomes a matter of political survival for China, especially during the US military's current readiness gap (2025-2027).

The 2026 breaking point is the "maturity wall," where trillions in debt borrowed at 0% in 2020-2021 must be refinanced at 5-6% or higher, leading to mass corporate defaults and bank failures.

Domestic political instability, extreme wealth inequality, and low trust in institutions create conditions where leaders may choose foreign war to control an angry population and redirect rage outward.

The predicted timeline for the next 6-12 months includes stagflation, corporate bankruptcies, regional bank failures, dollar collapse, resource conflicts, and cyber attacks escalating into hot war.

To prepare, individuals should reduce dependence on the financial system, eliminate debt, accumulate tangible assets (gold, land, essentials), develop valuable skills, and build community networks.

Unique Perspectives

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The Key Insight: The Death of Money Precedes War: The fundamental insight is that "war starts when the money dies," meaning the collapse of a nation's currency and the unsustainability of its debt are the true precursors to military conflict, not isolated political events.

The Dollar's Weaponization Backfired Catastrophically: The US freezing \$300 billion of Russia's central bank reserves in February 2022 shattered global trust in the dollar, transforming it from a neutral trade tool into a strategic vulnerability for other nations, accelerating de-dollarization efforts worldwide.

The 1914 Pattern of Financial Strangulation is Repeating: The historical dynamic of an established economic power (Britain then, US now) using financial weapons to contain a rising power (Germany then, China now) inevitably leads the rising power to view military force as its only path to survival.

Supporting Evidence

Unprecedented Global Debt Levels: As of late 2025, global debt exceeded \$320 trillion, more than 340% of global GDP, with the US federal government alone owing \$38 trillion officially, and over \$200 trillion including unfunded liabilities from Social Security and Medicare.

Rapid De-Dollarization and Gold Hoarding: In December 2025, China sold \$15 billion in US Treasuries, dropping holdings to a 2008 low, while other central banks (Japan, Saudi Arabia, Europe) also reduced holdings. Gold hit \$4,600 per ounce in January 2026, up 25% in three months, as central banks hoard gold at rates not seen since 1939.

China's Economic and Demographic Collapse: China faces the simultaneous collapse of its real estate sector (70% of household wealth) and a rapidly shrinking population (lost 2 million in 2023, projected 100 million+ by 2050), threatening the Communist Party's legitimacy which relies on economic growth.

The 2026 "Maturity Wall" of Debt: Trillions in corporate and government debt borrowed at 0% interest in 2020-2021 are maturing in 2026 and must be refinanced at 5-6% or higher, leading to mass defaults, bank failures, and an exponentially worse crisis than the March 2023 bank failures.

Thought-Provoking Questions

Will Domestic Instability Trigger Foreign Conflict?: With wealth inequality worse than 1928, extreme political division, and a looming economic crash in 2026, will leaders choose foreign war to redirect public rage, silence dissent, and maintain control, as seen in the 1930s?

When Currencies Collapse, Does Military Logic Prevail?: In an era of real resource scarcity and collapsing currencies, if the financial system fails and paper claims become worthless, will market logic be replaced by military logic, where nations "take what they need" by force?

WHY AMERICA CANNOT GET OUT OF THE IRAN WAR



Can America stop this war. Can it negotiate a ceasefire. Can it withdraw. Can it find a way out.

The answer — when you look at it carefully — is deeply unsettling.

America is trapped. It cannot go forward. It cannot go back. .

If America negotiates a ceasefire — Iran demands one trillion dollars in reparations and a permanent American withdrawal from the Middle East. That triggers a catastrophic chain reaction. The GCC becomes Iran's client states. The petrodollar collapses. Japan and South Korea remilitarize. Europe makes peace with Russia. And the US dollar — the foundation of an economy sitting on 39 trillion dollars of debt — loses its reserve currency status. The American economy collapses.

If America sends ground troops — Kharg Island leads to the coast leads to the Zagros mountains leads to a full scale land war. Mission creep. Exactly like Vietnam. From 3000 Marines to half a million troops.



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And if America tries to win militarily — its own military has war gamed this conflict countless times. And every single time — America loses.

America is trapped. And in this video Professor Jiang Xueqin explains his ideas on exactly how that trap works.

Here is the Summary Transcription of the video. I hope you find this summary informative, if not unsettling.

Note, while Professor Jiang’s thesis is well thought out, we should note his background, which is presented in another article in this newsletter entitled Will America Lose the War Against Iran. Professor Jiang is not a real professor but an educator who, along with his parents, emigrated from China to the US at the age of 6. He went to Yale and received a bachelor’s degree in English literature. He then became a reporter and went to China to cover events. He was arrested there and ousted from the country. But later, he seemed to change his political views and moved to Beijing, where he now produces YouTube videos on geopolitical topics. This is unusual because very few foreigners in China are allowed to broadcast YouTube videos from the country. This is the background we need to keep in mind when we listen to his geopolitical prognosis.

D. Miyoshi

Professor Jiang provides an insightful and sobering analysis, arguing that America is caught in an inescapable trap in the current conflict with Iran. The video meticulously details how both withdrawal and escalation lead to catastrophic outcomes, from economic collapse due to the petro-dollar's demise to an unwinnable land war. The analysis is compelling, highlighting the critical need for a paradigm shift from global domination to a cooperative world order, making a strong case that America's current approach is unsustainable and fraught with peril.

America is deeply trapped in the war with Iran, facing catastrophic economic collapse if it withdraws, military defeat if it escalates, and an inability to negotiate a ceasefire, with the only viable path forward requiring a fundamental shift to a cooperative global order.

Summary

The war with Iran has its own momentum, making it difficult for either side to concede defeat, similar to the Ukraine war.

America cannot negotiate a ceasefire because Iran's demands

would include approximately \$1 trillion in reparations and a permanent US withdrawal from the Middle East.

A US withdrawal from the Middle East would trigger a catastrophic five-step chain reaction, beginning with GCC nations becoming Iranian client states.

The collapse of the petro-dollar, which underpins the American economy's ability to service its \$39 trillion debt, is a critical consequence of a US withdrawal.

Major Insight: The American economy is essentially a Ponzi scheme, relying on foreign nations continuously buying US dollars and US debt to keep functioning, with the petro-dollar as its engine.

A US withdrawal would lead to Japan and South Korea remilitarizing, reducing their reliance on American military support and purchases.

Europe would likely make peace with Russia if America withdraws from the Middle East, fracturing the Western alliance and American strategic dominance.

The combined effects would cause the US dollar to lose its global reserve currency status, leading to the collapse of the American economy.

A ground invasion to take Car Island, Iran's main oil export hub, would inevitably lead to mission creep into a full-scale land war within Iran, similar to Vietnam.

American military simulations consistently show that the US loses a full-scale war against Iran, as Iran has developed asymmetric tactics to counter American strengths.

Iran's strategy involves dispersed forces, drones, hypersonic missiles, underground facilities, and proxy forces, specifically designed to negate American air power advantages.

The only real solution is a fundamental change in America's approach, moving from global domination to a new world order based on cooperation and partnership with all major powers.

This new approach would involve America reducing its military bases globally, ceasing to use the dollar as an economic weapon, and collaborating with nations like Russia, China, and Iran to ensure global stability.





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Main Arguments

America is Trapped in the War: The core argument is that America is caught in a war with Iran, unable to negotiate a ceasefire, withdraw, or win cleanly, leading to a deeply unsettling situation with no good options.

War's Inherent Momentum: Once initiated, wars develop their own momentum and logic, making them difficult to stop, even when both sides recognize the enormous damage and suffering, as exemplified by the ongoing Ukraine war.

Ceasefire Demands are Catastrophic: Iran's likely ceasefire terms—\$1 trillion in reparations and permanent US withdrawal from the Middle East—would trigger a five-step chain reaction leading to the collapse of American economic and global power.

Ground Invasion Leads to Mission Creep: Any attempt at a limited ground operation, such as taking Car Island, would inevitably escalate into a full-scale land war inside Iran, mirroring historical mission creep scenarios like Vietnam.

US Military Cannot Win Against Iran: American military simulations consistently show the US losing a full-scale war against Iran, as Iran has spent 20 years developing asymmetric tactics specifically to counter US conventional advantages.

Unique Perspectives

Principle Insight: The Interconnectedness of US Global Power: America's military presence in the Middle East is not merely a regional security measure but the foundational pillar for the petro-dollar, the US dollar's global reserve status, and the stability of its alliances, making withdrawal an existential threat to the US economy and global standing.

Iran's Tailored Asymmetric Defense Strategy: Iran has meticulously studied America's military playbook for over two decades, developing a comprehensive strategy of dispersed forces, drones, hypersonic missiles, and proxy forces to negate US "shock and awe" tactics and exploit its vulnerabilities.

The US Economy as a Ponzi Scheme: The video posits that the American economy, burdened by \$39 trillion in debt, functions as a Ponzi scheme, relying on foreign nations continuously buying US dollars and debt, a system critically dependent on the petro-dollar.

Supporting Evidence

Five-Step Catastrophic Chain Reaction: The withdrawal of US forces from the Middle East would lead to the GCC becoming

Iranian client states, the collapse of the petro-dollar, remilitarization of Japan and South Korea, Europe making peace with Russia, and ultimately, the US dollar losing its reserve currency status.

Historical Precedent of Mission Creep: The Vietnam War, which escalated from 3,000 Marines to half a million troops, is cited as a direct historical parallel for how a limited ground operation in Iran could spiral into an unwinnable land war due to the "sunk cost fallacy."

Aircraft Carrier Vulnerability: Despite their immense power, US aircraft carriers like the USS Abraham Lincoln and USS Gerald Ford are forced to operate far from Iran's coast due to the threat of Iranian drones and hypersonic missiles, highlighting a key limitation of US conventional power.

Thought-Provoking Questions

Can America Embrace a New World Order?: The central question posed is whether America possesses the humility and vision to abandon its role as an unchallenged hegemon and instead foster a new world order based on partnership and cooperation with major powers like Russia, China, and Iran.

Is the Cost of Waiting Too High?: The video questions how long America can delay making fundamental changes to its foreign policy before the costs of the current path become prohibitively expensive and painful for itself and the entire world.

Outline of the Thesis

The Core Question

The most important question of this war: Can America stop it, negotiate a ceasefire, withdraw, or find a way out?

The unsettling answer: America is trapped, unable to go forward or back.

Part One: The War's Own Momentum

Once a war begins, it develops its own momentum and logic, controlling politicians and generals rather than being controlled by them.

Example: Ukraine War

Both sides knew a negotiated settlement was possible early on, despite enormous damage and suffering.

Four years later, the war continues because stopping requires one



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side to accept painful loss, humiliation, or unbearable terms.

The conflict with Iran is expected to follow this pattern, dragging on for years as neither side will concede defeat.

This war is more complicated than Ukraine because even if America wanted a ceasefire, Iran's demands would be devastating.

Part Two: The Ceasefire Trap

Iran's Demands for a Ceasefire

Approximately \$1 trillion in reparations for war destruction, decades of sanctions, and economic damage.

America must permanently leave the Middle East, withdrawing all military presence from the region forever.

Iran's rationale: To guarantee its long-term survival and prevent future American intervention.

Catastrophic Chain Reaction if America Leaves the Middle East

Step 1: The GCC Becomes Iran's Client States

GCC nations (Saudi Arabia, UAE, Qatar, Kuwait, Bahrain) currently rely on American military protection.

Without US protection, Iran becomes the sole regional power capable of guaranteeing GCC safety and controlling the Strait of Hormuz.

GCC nations would have no choice but to fall under Iranian influence.

Step 2: The Petro Dollar Collapses

The GCC is the foundation of the petro dollar system, which is crucial for the American economy.

GCC sells oil in US dollars, creating global demand for dollars. GCC recycles these dollars back into the American economy by buying Treasury bonds and investing in markets, funding US debt.

This mechanism allows America to function with \$39 trillion in debt, acting as a "Ponzi scheme" reliant on foreign nations buying US dollars and debt.

If GCC falls under Iranian influence, the petro dollar disappears, collapsing the foundation of American financial power.

Step 3: Japan and South Korea Remilitarize

These nations observe America's struggles and question its ability to protect them against China and North Korea.

If America withdraws from the Middle East, it signals a potential willingness to withdraw from Asia, forcing Japan and South Korea to build their own military capabilities.

This remilitarization means they spend resources on their own defense instead of supporting American military infrastructure, further weakening US strategic power.

Step 4: Europe Makes Peace with Russia

Europe, currently supporting America's confrontation with Russia at high economic cost, would conclude that America is re-treating and no longer a reliable global security guarantor.

Europe would likely seek a peace treaty with Russia, fracturing the Western alliance system and eroding American strategic dominance in Europe.

Step 5: The US Dollar Loses Reserve Currency Status

The collapse of the petro dollar, reduced support for US military infrastructure, and fracturing alliances would lead to the US dollar losing its global reserve currency status.

Nations would stop holding dollars, buying American debt, or recycling earnings into US markets.

America, with \$39 trillion in debt, would be unable to service it without global demand for dollars, leading to the collapse of its economy.

Conclusion of Ceasefire Trap: The cost of staying in the war is enormous, but the cost of leaving is even more catastrophic, leaving America stuck with no good options.

Part Three: The Ground Invasion Trap

Pressure to escalate could lead to a ground invasion to demonstrate strength.

The Car Island Scenario (Rumor)

A rumor suggests Marines might take Kharg Island, Iran's most



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critical strategic asset and economic lifeline (90% of oil exports).

The logic: Destroy Iran's funding, bring it to its knees economically, and boost American morale.

The Problem: Mission Creep

Taking Kharg Island is feasible, but holding it is impossible due to its proximity to the Iranian coast and constant attacks.

Protecting forces on Car Island would necessitate taking the nearby coastline, then the Zagros Mountains overlooking the coast.

This escalates into a full-scale land war inside Iran, a geographically challenging country.

Historical Parallel: Vietnam

In 1965, 3,000 Marines sent to Da Nang for a limited mission escalated to half a million troops four years later.

The Sunk Cost Fallacy

Once committed and losses incurred, leaving becomes psychologically and politically impossible, as it means admitting defeat and making past sacrifices seem futile.

America experienced this in Vietnam, Iraq, and Afghanistan, and is poised to repeat it in Iran.

Part Four: Why America is Actually Losing This War

Mainstream coverage hides that the American military does not want this war because war games consistently show America loses against Iran.

American Military Design vs. Iranian Strategy

The US military is built for "shock and awe," overwhelming air power, and rapid destruction of defenses (e.g., Iraq 2003).

Iran has studied America's playbook for over 20 years, identifying weaknesses and building an asymmetric military strategy to counter US advantages.

Iran avoids massing forces, instead dispersing, hiding, and using drones, hypersonic missiles, underground facilities, and proxy forces.

Aircraft Carriers: Powerful but Vulnerable

US aircraft carriers (USS Abraham Lincoln, USS Gerald Ford) are symbols of power but remain far from Iran's coast.

Getting too close risks entering the range of Iranian drones and hypersonic missiles, and losing a carrier would be a catastrophic blow.

Iran knows carriers will stay back, having prepared for this war for decades with perfect counters to America's playbook.

Part Five: What Should America Actually Do?

The Iran war is not isolated; it's connected to global conflicts (China trade war, Ukraine, Asia tensions), all symptoms of an overstretched American empire.

America's widespread involvement allows enemies to provoke conflicts that drain resources, damage reputation, and weaken its global position.

The Only Real Solution: A Fundamental Change in Approach

America must acknowledge that the old world order, with the US as unchallenged hegemon, is over.

A new order is needed where America acts as a genuine partner, not a bully, with every major power having a stake in stability.

The global economy should function to benefit everyone, not just a privileged few.

Practical Steps for a New World Order

Stop maintaining military bases in 80 countries.

Stop using the dollar as a weapon of economic warfare.

Sit down with Russia, China, and Iran to build a cooperative system where everyone's interests are met, reducing the need for war.

Conclusion: This path is wisdom, not weakness, and is the only way to avoid catastrophe.

The longer America waits to make this choice, the more expensive and painful it becomes for all involved.



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DID CHINA FAKE ITS MILITARY BREAKTHROUGHS?



China is quietly purging its top weapons scientists—including the chief designer of the J-20 stealth fighter. From radar to missiles to nuclear research, key figures are disappearing. What triggered this sweeping crackdown? After real combat failures in Iran and Venezuela, serious questions are emerging about China's military technology. Is this corruption—or something deeper?

The video by Lei's Real Talk offers an insightful analysis, concluding that the widespread purges of China's top defense scientists are a direct consequence of systemic falsification and corruption within its military-industrial complex. Real-world combat failures in Venezuela and Iran exposed the ineffectiveness of supposedly advanced systems like anti-stealth radar and potentially the J20 fighter's stealth capabilities. This "scientific decapitation" reveals a multi-billion dollar academic fraud, severely undermining China's military image and complicating its geopolitical ambitions, particularly regarding Taiwan.

China's military breakthroughs, including its stealth fighter and anti-stealth radar, are likely faked due to systemic falsification and corruption, as evidenced by the recent purges of top defense scientists and the poor performance of Chinese systems in real combat.

Summary of Video

On March 17th, the Chinese Academy of Sciences quietly removed Yangwei, the chief designer of China's J20 stealth fighter jet and former deputy general manager of AIC, from its list of members.

Three other members of the Chinese Academy of Engineering, including top experts in radar, missile guidance and control, and

nuclear physics, were also quietly removed.

Mr. Woo, a top radar expert, previously served as general manager of CETC, the state-owned maker of radar systems.

Mr. Wei is a missile guidance and control expert deeply involved in cruise missile systems and navigation technologies.

Mr. Jiao specializes in nuclear and condensed matter physics and is an academic leader in China's nuclear weapons research.

These three individuals represent the top tier of China's radar, missile, and nuclear fields, which are deeply interconnected.

Mr. Woo and Mr. Wei are directly tied to systems heavily promoted by the CCP, such as the JY27 anti-stealth radar and the HQ9 air defense missile system.

In real combat scenarios, from Venezuela to Iran, China's radar and air defense systems were completely suppressed, failing to detect anything and being paralyzed before they could respond.

This wave of purges in the military industrial system is very likely triggered by systemic falsification and corruption.

Yangwei's problem, despite the J20 being in service for years, is suspected to be political or corruption-related rather than technical, as his removal from positions began over a year ago.

The purges represent a significant blow to one of Xi Jinping's signature military achievements and his "strong military" narrative.

The first main reason for the purges is likely systemic military industrial falsification, particularly concerning the J20's stealth capabilities.

China's anti-stealth radar, claiming to detect stealth aircraft, could only be tested against China's own J20, creating a self-deceptive illusion.

Major Insight: The fact that the "fake" radar was still able to detect China's own J20 implies that either the radar is fake, or the J20 itself isn't truly stealth, suggesting its stealth capability may be deeply compromised.

The closed-loop testing of the radar and stealth fighter means both systems could be built on illusion, with their true capabili-



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ties only revealed in real combat.

Real combat in Venezuela and Iran exposed not only the radar's failure but potentially the J20's compromised stealth capabilities, a realization the CCP may have only just made.

The second reason for the purges is political, as these high-tech achievements were central to Xi Jinping's narrative of China surpassing the West.

The list of purged experts reads like a "destruction road map" of China's military industry, representing the collapse of the brain of China's defense sector.

Western observers are stunned by this "scientific decapitation," suggesting that China's "indigenous innovation" may be a multi-billion dollar academic fraud.

These exposed systems reveal illusion rather than strength, embarrassing China internationally and exposing its true capabilities to adversaries.

The exposure of China's real military capabilities makes any talk of military action against Taiwan far more difficult.

Analysis and Main Arguments

Systemic Falsification as a Core Issue: The widespread purges of top military scientists and executives are likely triggered by systemic falsification and corruption within China's military-industrial complex, exposed by the poor performance of systems in real combat.

Political Implications of Military Failures: The purged experts were once symbols of Xi Jinping's "strong military" narrative and "China rising" achievements, making their downfall a significant political blow and indicating a potential collapse of the defense sector's intellectual leadership.

Exposure of True Military Capabilities: Failures of Chinese radar and air defense systems in real combat scenarios, such as in Venezuela and Iran, have not only embarrassed China but also exposed its true, potentially compromised, capabilities to its adversaries.

Unique Perspectives

Principal Insight: The Self-Deceptive Closed Loop of Stealth Testing: China's anti-stealth radar was tested against its own J20 stealth fighter, creating a closed-loop system where successful detection of the J20 led to the false conclusion that the radar worked. This illusion was shattered when the same radars or the

J20's stealth capability is deeply compromised. failed completely in actual combat, implying either the radar is fake

"Scientific Decapitation" of Defense Sector: The extensive list of purged experts, including specialists in nuclear power, missile control, ballistic materials, and aero engines, represents a "scientific decapitation" and the collapse of the brain trust of China's defense sector.

Indigenous Innovation as Academic Fraud: The collective entanglement of top defense scientists in corruption and money deals suggests that China's much-touted "indigenous innovation" may, in reality, be a multi-billion dollar academic fraud targeting the highest levels of leadership.

Supporting Evidence

Purge of Key Military Figures: Yangwei, chief designer of the J20 stealth fighter, was removed from the Chinese Academy of Sciences, alongside three members of the Chinese Academy of Engineering: Woo (top radar expert), Wei (missile guidance expert), and Jiao (nuclear physics specialist).

Real Combat Failures of Chinese Systems: China's JY27 anti-stealth radar and HQ9 air defense missile systems were completely suppressed and failed to detect anything in real combat situations in Venezuela and Iran, becoming a "global laughing stock."

Timeline of Yangwei's Removal: Yangwei's problems began as early as January last year when he was removed from his position, with his entire profile being erased more than a year later, indicating a confirmed political takedown after extensive scrutiny.

Thought-Provoking Questions

Impact on Future Military Actions: With China's real military capabilities potentially exposed and its defense sector's leadership purged, how does this affect the feasibility and confidence in any future military action, particularly against Taiwan?

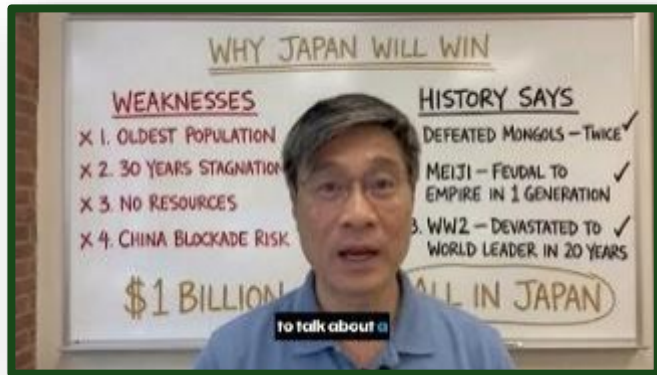
True Extent of Falsification: If core systems like stealth fighters and anti-stealth radars are compromised, what is the true extent of systemic falsification across other high-tech military achievements promoted during the Xi Jinping era, such as hypersonic weapons?

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WHY JAPAN WILL WIN



Professor Jiang offers an insightful analysis, arguing that Japan, despite its apparent demographic and economic weaknesses, is poised to be a surprise winner in the current global climate. He uses compelling historical precedents—from defeating Mongol invasions to the Meiji Restoration and post-WWII recovery—to illustrate Japan's extraordinary capacity for collective resilience and rapid transformation during existential crises. This analysis effectively links these historical patterns to current global trends, framing them as opportunities Japan is uniquely equipped to leverage for future strength.

Despite facing significant demographic and economic challenges, Japan's historical pattern of extraordinary resilience and rapid transformation in the face of existential crises positions it to become a surprise winner in the current global conflict by strategically leveraging trends like remilitarization and mercantilism.

Summary

The video introduces Japan as a country almost nobody is discussing in the context of the current global conflict, yet it is predicted to emerge as the single biggest surprise winner.

Japan faces significant structural weaknesses, including having the world's oldest population (over 28% above 65), a 30-year deflationary economic spiral, and extreme dependence on imported resources.

A critical vulnerability for Japan is its reliance on 75% of its energy from the GCC, transported through

the Strait of Malacca, which could be controlled by China if Taiwan is reunified, potentially leading to a blockade.

While economists focus on negative data, historians observe Japan's consistent pattern of resilience and transformation when facing existential threats.

Historically, Japan, as a feudal and divided nation, twice defeated the powerful Mongol Empire in the 13th century, demonstrating unexpected unity and ferocity.

During the Meiji Restoration in the 19th century, Japan rapidly transformed from a feudal state to an industrial power in one generation, mastering Western technology and military organization, culminating in defeating the Russian Empire in 1905.

After the complete devastation of World War II, Japan recovered in just 20 years to become the world's greatest manufacturing power, driven by collective will, intelligence, discipline, and creativity.

Principal Insight: Professor Jiang emphasizes that Japan's consistent historical response to existential crises—transforming with breathtaking speed and thoroughness—is why it will overcome current challenges and emerge stronger.

The current global conflict accelerates three trends—**remilitarization, mercantilism, and de-industrialization**—which, despite appearing as threats, create unique opportunities for Japan.

Japan is undertaking its most significant military expansion since WWII, doubling its defense budget and developing advanced military technology like hypersonic missiles and AI-powered defense systems, mirroring its rapid adaptation during the Meiji Restoration.

Japan has been preparing for independent supply chains for decades, demonstrating extreme energy efficiency (half of China's per unit of output) and advanced energy storage, positioning its outward-looking national instinct as an advantage in a mercantilist world.

The dynamic between China and Japan, characterized by China's inward-looking and Japan's outward-looking mentalities, is complementary, allowing for continued deep economic intertwining rather than inevitable conflict.

Professor Jiang concludes that he would invest every



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dollar in Japan over China, based on Japan's historical pattern of resilience and transformation, predicting its emergence as a stronger nation in 10-20 years.

Main Arguments

Japan as a Surprise Winner: Despite significant structural weaknesses like an aging population, economic stagnation, and resource dependence, Japan is uniquely positioned to emerge as a surprise winner from current global conflicts and trends.

Historical Resilience as a Predictor: Japan's consistent historical response to existential threats – from Mongol invasions to post-WWII devastation – demonstrates an extraordinary capacity for collective resilience, rapid transformation, and innovation, which will be activated by current global crises.

Exploiting Global Trends: The current global trends of remilitarization, mercantilism, and the evolving China-Japan dynamic, which may appear as threats, actually present unique opportunities that Japan is exceptionally well prepared to exploit.

Unique Perspectives

Insight 1: Historical Patterns Over Economic Data: While economists focus on current data like debt ratios and demographic curves that paint a bleak picture for Japan, a **historical perspective reveals a consistent pattern of the Japanese people uniting and finding ways to survive and thrive when faced with existential threats.**

Mercantilism as an Opportunity: The breakdown of global free trade and the push for independent supply chains, seemingly catastrophic for resource-poor Japan, is actually an opportunity for a nation that has been quietly building resilience and efficiency for decades, returning to its deep-seated outward-looking, seafaring national instinct.

Insight 2: Complementary China-Japan Mentalities: Contrary to the common assumption of inevitable conflict, China's inward-looking "Middle

Kingdom" mentality and Japan's outward-looking seafaring nature are not competing but complementary strategies, allowing for continued economic intertwining and potential coexistence rather than collision.

Supporting Evidence

Rapid Post-War Recovery: After being utterly devastated by atomic bombs and firebombing in 1945, Japan transformed into the world's greatest manufacturing power within just 20 years, demonstrating unparalleled speed and collective will.

Meiji Restoration Transformation: In the mid-19th century, Japan rapidly transformed from a feudal nation to an industrial power in a single generation, mastering Western technology and military organization to defeat the Russian Empire by 1905, thereby avoiding Western colonization.

Energy Efficiency and Storage: Japan consumes approximately half the energy per unit of economic output compared to China and has developed some of the world's most advanced energy storage technology, making its manufacturing processes the most resource-efficient on Earth.

Thought-Provoking Questions

Investment Strategy in East Asia: Given Japan's historical capacity for transformation during crises, is it a better long-term investment than China, despite China's current economic size and military growth?

Impact of Remilitarization: How will Japan's significant military expansion, including the development of hypersonic missiles, advanced drone swarms, and AI-powered defense systems, reshape the balance of power in East Asia and global security?

Structured Notes on the Presentation

Thesis: Everyone Is Counting Japan Out — They Are Making A Massive Mistake

Introduction

Japan is often overlooked in global conflict discussions, but it is poised to become a significant surprise winner.

Despite common perceptions of weakness, a deeper historical analysis reveals a different story.



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Part One: Japan's Perceived Weaknesses

Japan faces serious structural problems that make it appear vulnerable:

Demographic Challenges:

Japan has the oldest population in the world, with over 28% aged 65+.

This leads to fewer workers, less productivity, reduced innovation, and a growing burden of elderly care.

Economic Stagnation:

Stuck in a deflationary spiral for 30 years, characterized by falling prices, stagnant wages, accumulating debt, and slow growth (e.g., 1% vs. China's 8-10%).

Excessive debt burden has kept the economy in slow motion.

Resource Dependence:

As a small island nation, Japan has almost no natural resources and must import nearly everything to sustain its economy and population.

Vulnerability to Blockade:

Approximately 75% of Japan's energy comes from the GCC, traveling through the Strait of Malacca.

If China controls Taiwan, it could effectively control Japan's energy lifeline, potentially blockading and crippling its economy without direct military conflict.

Summary of Surface-Level Issues: Oldest population, 30 years of stagnation, no natural resources, energy dependence, and vulnerability to Chinese blockade.

Part Two: What History Actually Tells Us About Japan

A historical perspective reveals Japan's extraordinary capacity for resilience and transformation.

Moment One: The Mongol Invasions (13th Century)

In 1274, the Mongol Empire, the most powerful military force globally, prepared to invade Japan after conquering vast territories.

Japan was a small, feudal, divided nation with no unified army, seemingly no chance against the Mongols.

Despite the odds, the Japanese fought back with unexpected ferocity and unity.

A massive typhoon (the kamikaze or "divine wind") struck and destroyed the Mongol fleet, leading to the invasion's failure.

The Mongols returned in 1281 with an even larger force, but again, the Japanese resisted fiercely, and another typhoon destroyed the fleet.

Historical Lesson: When facing an existential threat, the Japanese people unify and fight with everything they have to survive.

Moment Two: The Meiji Restoration (Mid-19th Century)

Around 1850, Western industrial powers were colonizing Asia, and Japan, still a feudal nation, was expected to be next.

Japan made a collective national decision to rapidly transform by mastering Western technology, industrial methods, military organization, and scientific knowledge.

Within 20-30 years (a single generation), Japan transformed from a feudal society to an industrial power with modern military and infrastructure.

In 1905, Japan stunned the world by defeating the Russian Empire, marking the first time an Asian nation defeated a European great power in modern history.

Historical Lesson: Japan possesses an unprecedented capacity for rapid, complete transformation in response to existential threats.

Moment Three: Recovery After World War II (Post-1945)

In August 1945, Japan faced utter devastation from atomic bombs, firebombing, destroyed military, and shattered economy.

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By any historical measure, Japan was "finished" with no realistic scenario for meaningful recovery.

Yet, within 20 years (one generation), Japan became the world's greatest manufacturing power.

This recovery was driven by the collective will, intelligence, discipline, and creativity of the Japanese people, not luck or resources.

Historical Lesson: Japanese culture possesses a deep capacity for extraordinary recovery and transformation in the face of extreme adversity.

Part Three: Why Japan is the Surprise Winner of This War

The current global war is accelerating three trends that, despite appearing as threats, create unique opportunities for Japan.

Opportunity One: Remilitarization

For 80 years, Japan has been constitutionally prohibited from offensive military forces, relying on American protection.

The current global conflict exposes limitations of American military power, forcing Japan to rethink its defense.

Japan is undertaking the most significant military expansion in its post-WWII history, doubling its defense budget and developing advanced military technology (hypersonic missiles, drone swarms, AI defense systems).

Argument: Japan will rapidly master modern military technology, just as it did during the Meiji Restoration, building something unique and extraordinary.

Opportunity Two: Mercantilism

The war is fragmenting global free trade and pushing nations towards independent supply chains, which seems catastrophic for resource-poor Japan.

However, Japan has been preparing for this scenario for decades, learning from its WWII experience of cut supply lines.

Key Strengths:

Uses approximately half the energy per unit of economic output compared to China.

Developed advanced energy storage technology.

Manufacturing processes are among the most resource-efficient globally.

Argument: In a world of expensive and scarce energy, Japan's efficiency is a "superpower."

Japan's outward-looking, seafaring national instinct, honed over centuries of engaging with the world to extract value, is perfectly suited for a mercantilist global environment.

Opportunity Three: The China-Japan Dynamic

While a rising China is often seen as an existential threat to Japan (e.g., Taiwan control impacting energy lines), analysts often miss their fundamentally different, potentially complementary mentalities.

China's Mentality: Sees itself as the "middle kingdom," self-sufficient, historically turning inward to focus on sovereignty and stability, avoiding foreign entanglements.

Japan's Mentality: An outward-looking, seafaring island nation that has always had to engage with the world to survive, constantly trading and exploring.

Argument: These are not competing but complementary strategies; nations looking in different directions do not necessarily collide.

Despite historical tensions and territorial disputes, China and Japan maintain hundreds of billions of dollars in trade, indicating a complex but not necessarily warlike relationship.

Part Four: The Billion Dollar Question

If given a billion dollars to invest in East Asia (China or Japan), the speaker (Jiang) would invest every dollar in Japan.

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What's Really Happening in America and the World



Financial Crisis Report II



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He appears in 14 Who's Who publications throughout the world and is listed as a specialist in international business, real estate and estate planning.

This is not due to Japan's current state, but its consistent historical response to existential crises: extraordinary collective resilience, creativity, and transformation with breathtaking speed.

Current crises (unreliable American protection, growing Chinese power, threatened energy lines, fragmenting global economy) are precisely the conditions that historically bring out the best in Japan.

While China's current strength is built on a model being destroyed by the war, its historical response to crisis is to turn inward.

Japan's historical response is to transform, innovate, and emerge stronger.

Conclusion: Japan will emerge from this crisis stronger than anyone expects, becoming the surprise winner of this war.

But this will likely take some time to come to pass. At the end we will see if Professor Jiang is right.....or not.

D. Miyoshi

Trust and Estate Corner



My clients are always inquiring about wills, trusts and estates. Each publication of *Financial Crisis Report II* (Reporting What's Really Happening in America and the World) will feature a simple factoid on Trusts and Estate Planning. For more information you may consult my website at www.miyoshilaw.com

A trust allows you to keep control.

Your trust document contains instructions for managing your assets, as well as how the funds will be used in the event of your death or incapacity. Without a trust, while you still get to designate who gets your assets, you do not have a say in what they do with those assets.



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