

Taking a punch, & getting up again

Last week, we published a missive from Evergreen's partner Louis-Vincent Gave titled "[Where will the next deflationary shock come from?](#)" In the piece, Louis discussed whether there are any lurking deflationary shocks supporting the view that the inflation readings we've recently seen are "transitory". This week, we are sharing a superb presentation by Louis from John Mauldin's 2021 Strategic Investment Conference (SIC). During the presentation, Louis goes even deeper on the very relevant topic of inflation. We've included both a recording of the presentation and a slide deck below. Please enjoy!

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