

Bitcoin Treasury Company

So a big thought on my mind, is thinking and wondering what is more valuable; bitcoin, microstrategy, something else?

So one of the first investor announcements in which I attended, live webinar, hosted on Zoom, for micro strategy maybe like October 30 last year... Very very exciting as it was my first time attending a live investor call. To see Michael Saylor in the virtual flesh, life was really really exciting... Like seeing a live rockstar!

Anyways, well what was kind of interesting was Michael Saylor branded microstrategy as a “bitcoin treasury company”, or funny enough a... “BTC”.

In another talk Saylor did in front of a bunch of investors, maybe a month prior to that, Michael essentially noted that essentially microstrategy was **becoming a bitcoin bank**, however you cannot do overnight deposits and withdrawals which means that microstrategy has a permanent base of bitcoin treasury. And if we think about **the greater macro trends of bitcoin going up forever to the top right**, then what that means is that microstrategy is easily poised to become a \$1 trillion plus company. Maybe at least 3 trillion or even 10 trillion in the next 10 to 20 years?

Bitcoin bank

I think for a long time if you said, you can invest in a bank, in the early days-- it would be seen as a winning bet. For example can you imagine investing in JP Morgan Chase like 120, 200, 300 years ago? Certainly your family would have a fortune.

Or another analogy is like becoming standard oil, becoming an oil company, investing in oil. Certainly everybody understands that oil is valuable, but the way that John D. Rockefeller made it very very useful was being able to *standardize* oil, and transform the crude oil product into useful stuff like creating asphalt and also Jet fuel engine, and the gasoline you put in your car.

Standardizing Bitcoin, Standard Bitcoin

Year 1!

We are still in the early days of bitcoin, and now... The floodgates have opened. I feel like the whole planet right now is like a crypto arena, like a real life game of gladiator, a crypto Colosseum.

Anyways, things are starting to get fun and interesting; the reason being that now **when everyone is becoming to get scared shitless, this is when the real fun begins!** If anything, I'm hungry to get access to more capital, to invest when everybody else is scared. **I guess having big balls is a huge benefit in today's fun exciting volatile world.**

Wagyu is the key

In a totally unrelated note, on my 37th birthday, I had the extreme pleasure of being treated to the "gold", level of all you eat Japanese Wagyu Korean barbecue style, in Little Tokyo at my new favorite restaurant on the planet, "Chubby Cattle". All you can eat wagyu, A5 Wagyu... I love America!

And also kind of unrelated, probably one of the best kept secrets is that Costco sells American style Wagyu beef, ground beef, 70/30, in these bricks, which taste insanely good and great, and is only maybe like I think five dollars a pound? Typically my favorite is beef ribs, but one of the big problems about beef ribs is that half of the weight is just a bone, which is in some sense "filler", unless you instant pot the rib bones later to make a beef bone broth soup, which is also a good idea.

But anyways, I had only about 3 pounds of the Costco Wagyu ground beef last night, just cooked as simple burger patties, and I slept in like two minutes. I'm almost wondering... If you suffer from insomnia I have a hard time sleeping whatever, just try this; get a bunch of the Costco Wagyu ground beef, cook it at home on your fry pan or air fryer, try to eat at least three or 4 pounds of it, and then I can almost guarantee you that you'll fall asleep immediately. And the upside of

sleeping insanely well is that the next day, you wake up with so much bigger joy excitement, strength wellness optimism happiness and glee, and isn't this what everybody wants?

No man or woman can resist staying up,,, if you're eaten 5 pounds of Wagyu beef!

When in doubt, eat more Wagyu!

Weight lifting

I'm starting to think more and more, certainly anybody and everybody can benefit from weightlifting, doesn't matter if it is your 69-year-old mom, your neighbor next-door, you and your wife your kids whatever.

Instead of thinking of it like weightlifting, maybe we should think of it like *gravity training*. If you think about Goku in the gravity chamber, the basic concept and principle is simple; you're fighting against gravity, which will strengthen your tendons your bones your ligaments your body your muscles etc.... but I think the key idea and the key secret is towards strengthening and hormesis; **you do not want long-term stress on your body at a medium intensity**. Instead, you want an insanely high stressor or insanely high impact, for like half a second, for an insanely short duration, infrequently.

For example, better to lift 1000 pounds, once, for half a centimeter, once a week rather than to lift 100 pounds, 100 times, five days a week.

ONE REP MAX IS KEY.

Don't be a runner, be a sprinter!

Also in terms of fitness, better to do insanely short fun sprints, for like 30 seconds, the "HIIT" style, high intensity interval training rather than "run" for like five hours straight?

Or better to train for the 100 yard dash then to train for an ultra long marathon!

Also if you think about it... Think about 0 to 60 times, this is the ultimate test of any car. Better to go plaid, 0 to 60 in 1.99 seconds, then to drive a Toyota Prius for like 1000 miles.

Once again, **better to Usain Bolt it than to be one of those emaciated dying into low looking ultra distance runners.**

Ground beliefs

So, assuming that you have the ground truth that bitcoin is going up forever, in a very volatile manner, very jittery, up-and-down, but ultimately to the top and right forever, then what?

I also have a very interesting personal thesis about returns; maybe from a physics perspective, **the general idea is that in order for a high to go higher, you need a lower low?**

For example, if you did not have insanely high dips down, you cannot have new insanely high highs?

This also becomes interesting as a life philosophy, **in theory if you want higher highs, you also need lower lows?**

This also becomes very very radical and phenomenal of an idea, maybe one of my greatest thoughts yet:

When things go low, it actually brings you positive joy? Because you know that a new high is incoming?

Maximizing pleasure & joy?

I think what a lot of basic hedonists don't understand is that actually, if you desire a higher high you also need a lower low. What that means is simple; in order to harness a higher high, you actually need to become more spartan, sparing, embrace fasting.

For example, rather than blowing your load every single day, if you want to in theory maximize your hedonic sexual pleasure, you would actually in theory... Want to be celibate for like 29 days, and only have intercourse once a month?

Similarly speaking, if you were dumb rich, you would not want to buy a Lamborghini each and every single day, 30 days straight, 365 days in a year straight. This would probably not bring you much joy. It's kind of also like eating Japanese A5 Wagyu meat, it is only enjoyable if you eat it like once a year, once a month at tops, if you have it each and every single day, even the richest most wonderful thing can lose its appeal.

I LOVE LA FOREVER!

My mind is blown... It's like February 2, still technically the dead of winter, and the sun outside is so beautiful warm and nice, I could still be shirtless end of January early February? I'm never leaving this place! I'm like getting a tan and on the edge of getting sunburnt,,, in the middle of winter!

Gratitude for LA & the states

Actually one of the funniest thoughts I have about leaving the states going to Vietnam for about a month Hong Kong for a week-- being back... things that America, LA and the west side of LA have going for it:

1. **Air quality here is 10000x cleaner and better than Asia:** Ironically enough, one of the greatest benefits of being in the west side of LA, Culver City etc.... is actually, there's not many smokers here. It is quite rare here to see smokers. Compare this to being in Hong Kong, in which literally like 99% of the men all

smoke in the streets? And also being in Saigon, I love Saigon to death but the downside is because of the rapid industrialization, the pollution in Saigon and Vietnam is so bad.

2. **Access to meat:** in another funny turn of events, actually, having access to beef and meat in America is like 100 times better than anywhere else in the world? If you're in Asia, getting access to beef is actually very difficult; I suppose all the government subsidies for beef in America benefit us.
3. **Freedom of speech:** After being in Asia, the truth is you don't really have freedom of speech in Asia. One wrong sentiment and boom, you're gonna get a knock on your door. And also... internet censorship, no no no, the internet is not censored in America, it is more or less 100% free. Just try going to anywhere in Asia or Southeast Asia, when certain websites are banned or blocked or whatever... And then your mind will be opened. Even a simple thing... If you're in Hong Kong, you cannot use ChatGPT.

What if where you currently were standing were already paradise?

I also have another funny sentiment; actually a very positive and optimistic one: we forward in 2025 **I'm just gonna think that everything is good, even the "bad"?**

So simple!

SimpleStrategy?

100% or nothing?

ERIC
