

# DAILY GOOD, BAD, AND UGLY

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NEWSAMP

KEEPING YOU LEAN, MEAN, AND IN THE **GREEN**

## GOOD

Macron oversaw the signing of 14 agreements spanning aviation, defense, energy, and healthcare sectors. Notably, VietJet's purchase of 20 Airbus A330neo aircraft underscores France's commitment to bolstering economic ties.

Macron emphasized France's support for international maritime law, referencing the deployment of a French carrier strike group in the South China Sea earlier in 2025. This move signals France's intent to play a more active role in regional security matters.



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## BAD

**Online sports betting has exploded in the U.S. since 2018**, with companies like FanDuel and DraftKings shaping legislation to favor rapid expansion.

**Predatory Design:** Betting apps use data analytics to nudge users toward riskier behaviors—similar to how social media platforms drive engagement. The platforms are designed to keep you betting.

**Young Men Most at Risk:** The most vulnerable demographic? Young men in their 20s and 30s—drawn in by ease of access, sports fandom, and the thrill of fast wins.



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## UGLY

**"We are in the most structurally fragile bond market since the 1970s**—but with the financial complexity of the 2020s layered on top."

**Yields are High Across the Board:** U.S. Treasuries, European sovereign debt, and emerging market bonds are all offering significantly higher yields than they have for most of the past 15 years. The U.S. 10-year yield briefly crossed 5% in late 2023—the highest since before the 2008 financial crisis.



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## OUR TAKE (YOU'RE WELCOME)

GOOD

The purpose of the trip was to promote France as an alternative trading partner to the big dawgs (China and the US) by hawking rules based international order and mutual respect for sovereignty. The idea that the French could be a trading competitor with the US or China is laughable and such a French way of thinking its hilarious. This is no longer the 19<sup>th</sup> century Macron.

BAD

As a 20 something year old male this story actually hit home pretty hard. I am not a gambler particularly. I like to think I know when to hold em, fold em, when to walk away, and when to run. But I know a lot of guys that are really into betting, in particular sports betting. Now at first glance it seems like just another vice, but I happen to believe the problem is a lot bigger than just having support systems available for people that have gambling problems. Let's take a look at the numbers, since 2018 when the supreme court overturned the congress 1992 ban and let the states dictate their own gambling laws, the proverbial flood gates were opened. Regulations were essentially written by gambling industry representatives in some states. Online betting advertisements are now only slightly behind fast-food and pharmaceutical advertisements, which is great barometer of the current state of North American in my opinion. These companies business model essentially works like this, 60% of NFL bettors account for a total of 1% of sports book revenue, while 80% of revenue comes from a core group of 3% of gamblers. Now this is not exactly an outlier product. Alcohol, pornography, and luxury brands all have similar revenue models. This framework that the industry has been building is the same setup that other countries are in the process of taking down. This is because they are now seeing the problems that result from gambling. Suicide and depression, personal bankruptcies and financial instability, technological exploitation through AI and data analytics used to further entrench addictive behaviours. These are just the blatant and direct reprecussions that unregulated gambling will guarantee. So if you know people that are in this hole or are inching towards it, check in on them. Give them the love they deserve and need. Don't fall for these traps that Shaq and Kevin Hart layout.

UGLY

We're at a turning point. Bonds are finally offering real returns again-but at the cost of capital volatility and economic risk. If central banks cut prematurely, inflation might rebound, killing bond returns again. But if central banks stay too tight, recession could hit hard. Causing a yield collapse and bond rally-but after significant pain. The other big thing to think about is geopolitics matter much more to these securities than in the past (1970, 1994, 2008) China, Ukraine, Red Sea, US fiscal policy and de-dollarization all affect who buys bonds.

