

## Talk Your Book: Investing in Commodities

Today's Animal Spirits: Talk Your Book is presented by [Graniteshares](#):

We discuss:

- Boom and bust nature of commodities
- What is the role of commodities in a portfolio -- manage risk or price appreciation?
- Why would commodities add a risk management component to a typical portfolio?
- Do commodities need inflation to do well or is it about supply and demand?
- Should commodities be used for buy & hold or a tactical position?
- Is technology a headwind for commodities?
- Why is it so hard to match the return on actual commodities?
- The difference between commodity prices and commodity futures.
- What is the S&P 500 index of the commodity world?
- Are commodities a neglected part of the portfolio?
- Why should gold have a positive expected return?
- Is Bitcoin the new gold?
- Is Bitcoin a commodity?
- What is the expected return assumption for gold?
- Why are there no oil bugs?

Listen here:

Books mentioned:

- [Skating to Where the Puck Was by William Bernstein](#)
- [The Power of Gold by Peter Bernstein](#)

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Stories mentioned:

- [The lifecycle of an investment idea](#)
- [I'm buying gold](#)
- [Commodities are meant for trading not investing](#)

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