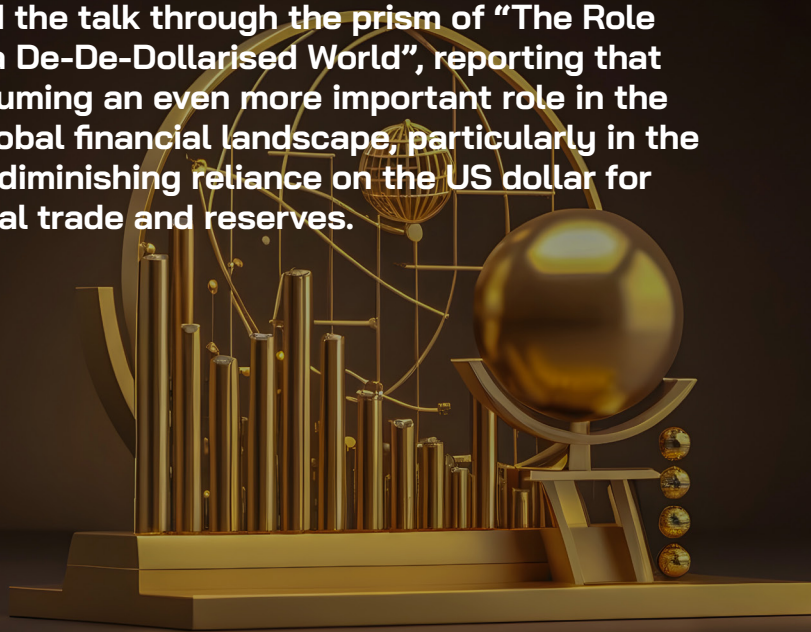


Gold Expert Joshua Rotbart on The Rising Role for Gold in a De-Dollarising World

Joshua Rotbart, Managing Partner of his gold investment, distribution and storage firm J. Rotbart & Co, gave delegates at the Hubbis Wealth Management Forum in Manila a valuable guide to the value of gold as an investment for wealthy private clients. He focused the talk through the prism of “The Role of Gold in a De-De-Dollarised World”, reporting that gold is assuming an even more important role in the evolving global financial landscape, particularly in the context of diminishing reliance on the US dollar for international trade and reserves.



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JOSHUA ROTBART

J. Rotbart & Co.

Rotbart opened his

presentation by acknowledging the familiarity and warmth of returning to Hubbis, Manila, celebrating the continuity of connections and partnerships fostered over the years.

He introduced the concept of de-dollarisation as a growing trend among nations to reduce their dependency on the US dollar, spurred by geopolitical manoeuvres, including sanctions that have led countries like Russia and China to seek alternatives to the dollar in international trade. "For the first time, trade between Russia and China saw the dollar share dip below 50%," Rotbart noted, emphasising the strategic pivot away from the US currency

due to its weaponisation (in global trade) and the ever-expanding US debt burden.

Gold's role rises amidst de-dollarisation

Drawing attention to the broader implications of de-dollarisation, Rotbart highlighted the diversification efforts by nations and the greater emergence in global trade of currencies and alternatives such as the Euro and Renminbi, albeit with the latter facing challenges in gaining global traction partly due to geopolitical concerns about China and also due to the country's economic and markets weaknesses. But he noted the important decline in the US Dollar's share as a reserve currency, from 72% to 59% over the past two decades, underscoring a gradual but definite shift in global currency preferences.

Central to Rotbart's presentation was the proposition that gold, with its longstanding value and stability, emerges as a viable alternative in a de-dollarising world.

Deep and liquid gold markets globally

"Gold offers open and deeply liquid markets, a trusted track record, geopolitical neutrality, and the ability to be converted into

other currencies, ticking all boxes of what we need from a reserve asset," he explained. He said that this perspective is supported by gold's historical performance, mirroring equity markets over a 20-year horizon, but with less risk and providing a hedge during financial crises.

Rotbart shared insights into gold's performance during key global crises and its role as a hedge against inflation, using comparative analyses to illustrate how gold preserves purchasing power over time. "If you had kept gold throughout those years you could buy more gasoline today than you could have bought 30-40 years ago," he stated, showcasing gold's enduring value.

Follow the actions of the central banks

Highlighting the strategic gold acquisitions by central banks, especially those aspiring for greater autonomy from the US dollar, Rotbart underscored the increasing preference for physical gold over 'paper' gold (such as ETFs) for long-term wealth preservation. "With physical gold, you own the asset directly, without counterparty risk, making it an ideal medium for wealth succession planning,"

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he emphasised, advocating for professional facilitation in acquiring and managing physical gold holdings.

He offered guests some brief insights into his company's role

in simplifying access to physical precious metals, with Rotbart explaining how the firm offers globally recognised, investment-grade gold alongside logistical support and add-on services such as Lombard loans against gold

collateral. He also recommended utilising their storage programme, which allows for the diversification of holdings across multiple global locations, thus mitigating geopolitical risks associated with holding tangible gold investments.

Gold is the 'real' money

Rotbart concluded his presentation with a quote from JP Morgan, "Gold is money, everything else is credit," reinforcing the timeless value of gold in financial planning. He invited the audience to engage further at their booth, signalling J. Rotbart & Co.'s readiness to assist clients in navigating the future with gold as a cornerstone of their investment strategy. ■

