



Tomorrow's crypto trends and how to invest in them



More than just investment funds: Decentralized autonomous organisations (DAOs)



- The DAO concept is not new
- Participants join together in interest groups to better achieve goals
- Current use: funding, administration e.g. IP rights, communication, work distribution

Projects



Our second wardrobe: Digital and phygital fashion



- More than 30 % of the top 100 brands already have Web3 projects in place
- Phygital = physical + digital
- Motivation: Secondary market trade, opening up new sales markets, customer loyalty and other airdrops, marketing (especially social media).
- Morgan Stanley sees digital fashion market at 50 bn USD in 2030

Projects



NFT sales using Nike "Cryptokicks" as an example



Revenue: 93 million US dollars

Secondary market transactions : 82.300

Secondary market revenue: 95 million US dollars

DOLCE & GABBANA

GUCCI



TIME



3 more topics with short term hype potential



Blockchain Gaming, not Metaverse



Regenerative Finance



Decentralized Social Media



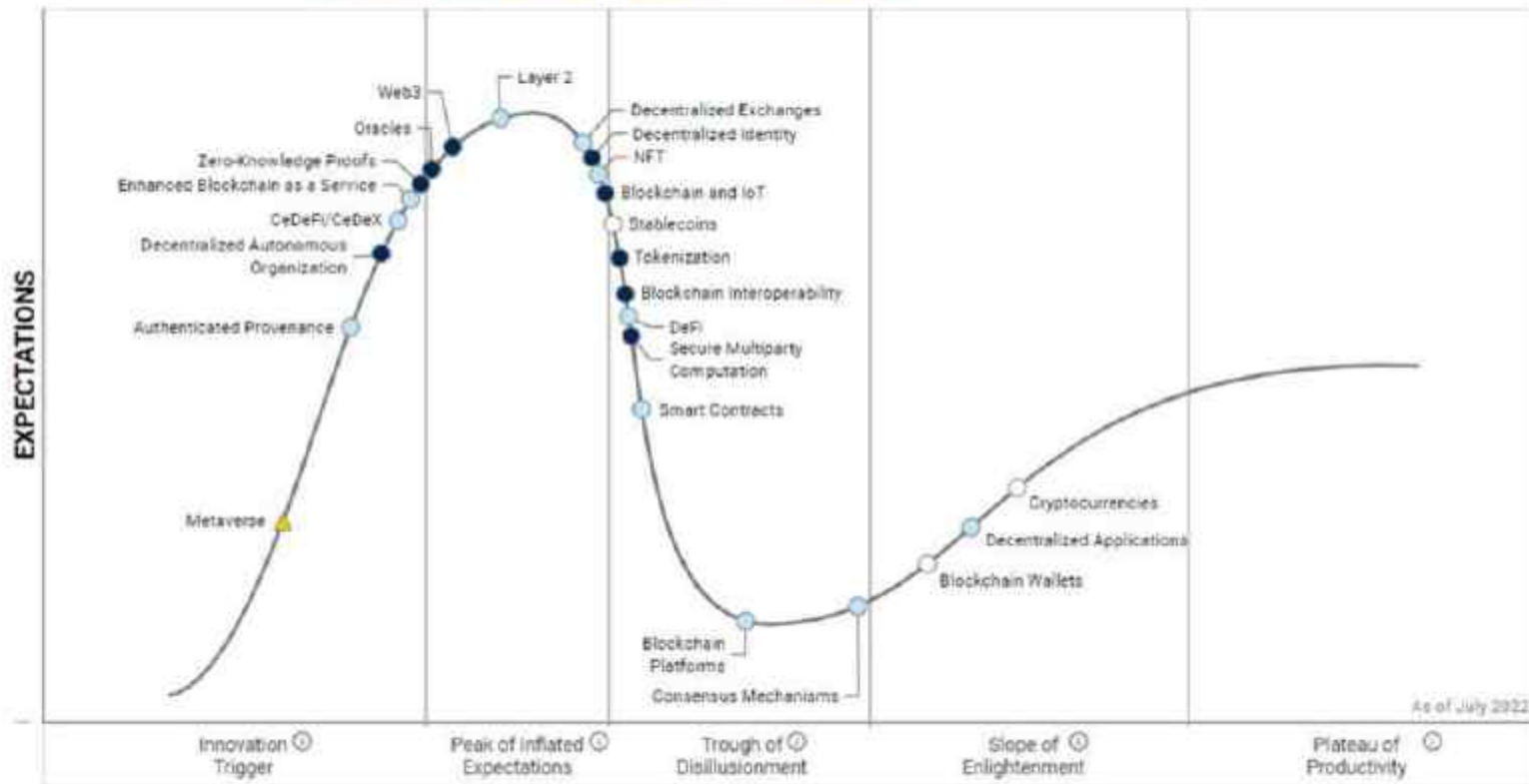


Every innovation comes in waves



Gartner blockchain, web3 hype cycle 2022

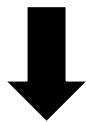
Time To Plateau Will Be Reached: < 2 yrs. 2-5 yrs. 5-10 yrs. > 10 yrs.



Source: Gartner

How do you find the needle in the haystack?

 P A N T E R A





- Team / management / track record
- Shareholder structure / token distribution
- Tokenomics
- Whitepaper
- Regulatory viability
- Use case / business modell



Predictions

Out of over **20,000** cryptocurrencies, only about **1 %** will last.

Among the current top **100** cryptocurrencies, around **25 %** will succeed.

Bitcoin: **98 %**
Ethereum: **90 %**



Infrastructures pay off



Public Companies (stocks)



Layer 1 blockchains



Uncertainty dominates, despite positive outlook



Pro	Contra
Negative news priced in	Potential crypto bans and overregulation
Hashrate and on-chain data develop very stably, network grows, becomes more decentralised and stable	Anti-Bitcoin media campaigns
More regulated products (e.g. ETFs) and providers	Negative macro development: higher interest rates and recession / black swan event
Tokenisation / digital securities	-
Number of blockchain developers grows and crypto-education continues to increase	-
Stock-to-flow model (Bitcoin)	-
Crypto sector becomes more sustainable	-

Thanks!



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Editor-in-Chief & Co-Founder

Sven Wagenknecht
sven.wagenknecht@btc-echo.de



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<https://www.btc-echo.de/>