

Nicola Lei Ravello

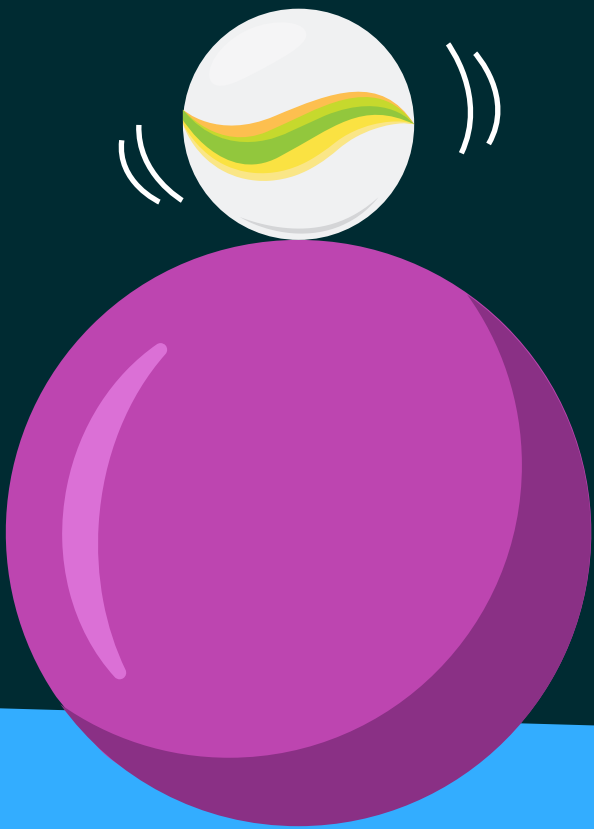
is the founder of White Stag Investing.

(DON'T!)
**WASTE
WATER**

White Stag Investing



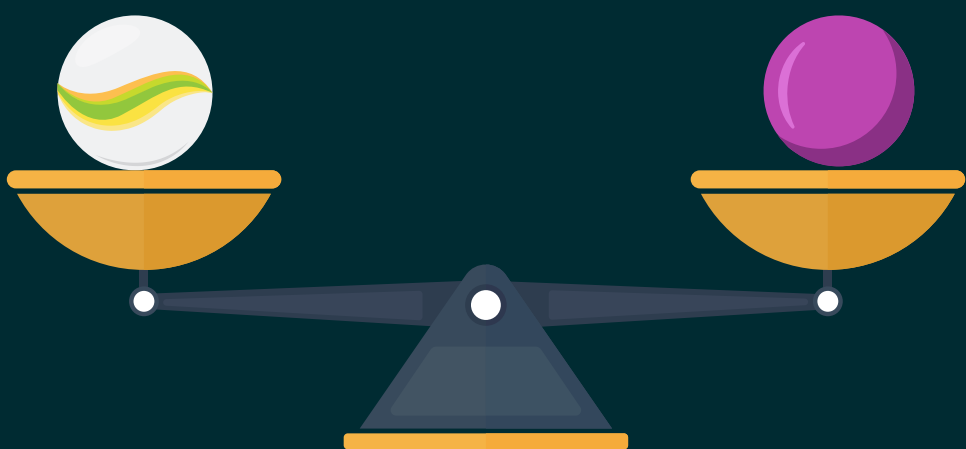
Imagine a marble on the top of a sphere: if everything is well balanced, it stays still. But as soon as you disrupt that equilibrium...



Well, that very well describes the interaction between water and pretty much all the other constituents of Earth.

I think something people definitely don't realize is how our whole economy is working because we have a steady supply of water!

Indeed: too little water?
Your industry will have to shut down.
Too much? Everything gets disrupted.

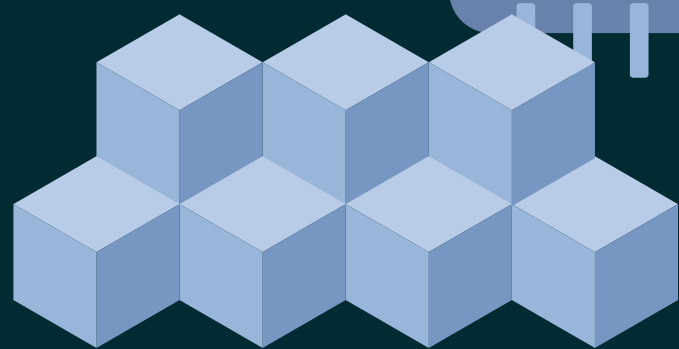
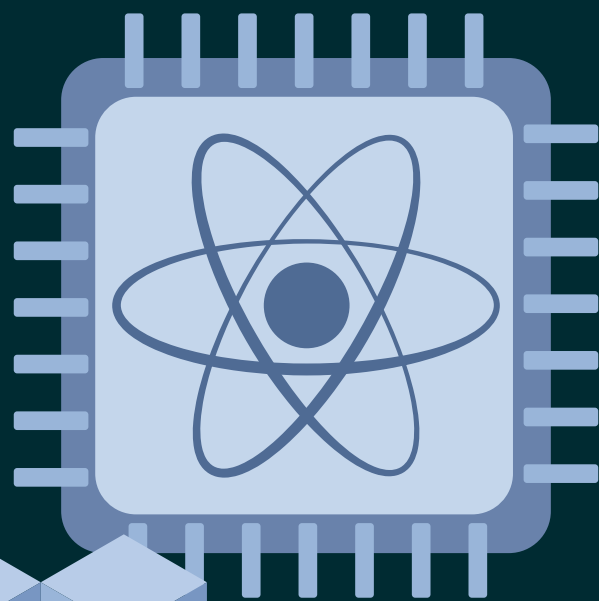


The problem is that if you don't acknowledge how fragile that equilibrium is, you won't be ready at all for it to get shaken up.

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If you're used to an unlimited and free supply of water, and now, there's a drought and no water available, then you need to do something about it.



... but that's too late, and like Taiwan's semiconductor industry in 2021, your production tool stands still.

Mitigating that risk is, however, fully doable! You can prepare yourself; it will just not come for free.

Once investors, asset managers, and economic decision makers know the real value of water, they will start preserving it. It's really using market forces to value water!

For that, specialists like Nicola will have to educate and support these decision-makers in assessing the water risk.

You build your infrastructure based on a set of probabilities; you create a buffer for uncertainty. With climate change, these uncertainties are changing, but you don't know how. So you need to adjust the buffer, and it's tough!



From a financial perspective, that means that even the safest positions get now exposed to new shades of risk - and portfolios need to adapt.

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For the Water Industry, that's a renewed opportunity to be seen as solution providers and sources of reliability instead of costs to be in business.



That's what I want to show: when you invest in water, in the infrastructure to secure water, you invest in the future.

And if water companies acknowledge and leverage that, they will finally appear as they should always have been: as the sexiest assets there is!

We also covered:

- How there are five shades of investing in sustainability and what they are
- How ESG approaches change the way many finance players do their job
- How humanity has built its wealth around water in all its forms and how that may soon backfire
- How new technologies can have an effect at a planetary scale and what it involves in our approaches to it
- How there's a relationship between building a ship and crossing the Atlantic as a Viking and modern investment approaches
- Industries that are the most exposed to water risks, the available tools to measure it, the finance scene rapidly evolving, water wars and manufacturing peace, water from an indigenous perspective, making balanced investment decisions in an uncertain world, writing, educating... and much more!

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