

Wednesday, December 5th 2018

Dear Mustafa,

I have gone for a brief 48 hour trip to the Lake District - 'Wordsworth Country'. But of course it is also 'Coleridge Country' and it is one of his poems, 'Kubla Khan', that is repeating in my mind.

The poem, famously written in an opium-inspired reverie, describes a mythical 'pleasure dome' set apart from the world - Xanadu.

It seems we continue to crave such a place. From the 66,000 sq. ft. home of Bill Gates called Xanadu 2.0, to the fictional estate of 'Citizen Kane,' to the current vision for America by our modern incarnation of Kubla Khan - Trump Kubla. His vision is for the USA to become an opulent, walled, de-globalised bubble.

In the poem, as we learn, not everything is perfect:

'And 'mid this tumult Kubla heard from far
Ancestral voices prophesying war!'

Trump Khan also listens to history. His antennae are currently twitching as he recalls the strain that rising interest rates put him under in the past; sending him bankrupt more than once. It is no surprise that Trump Khan says his main enemy is the Fed; they have

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disturbed his fragile personality.

Combine this fragility with a few losses, in the shape of the mid-term elections and the stock market, we now have a little fear at work.

'Beware! Beware! His flashing eyes, his floating hair!

Bankruptcies have taught Trump Khan that you have to borrow in order to spend and then to earn, and, furthermore that debt is a problem for the future, not the present. Hence the Democrats might find a very accommodative ear on Pennsylvania Avenue. And all the Democrats have to do is 'Weave a circle round him thrice, close their eyes with holy dread, For he on honey-dew hath fed, And drunk the milk of Paradise.' Fiscal spending is coming....bigly.

Today's Xanadu may continue to float for a bit longer, but something unexpected always happens. Coleridge's vision ended when someone knocked on his front door and the poem remained unfinished.

See you on Monday - Chris