

It's your letters... cryptocurrency, Alzheimer's, batteries and smart grids

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Here are some letters, on our recent articles. All feedback is welcomed – so please, keep it coming.

Lots of the smartest feedback was on our articles about batteries, as you'll see below. There's undoubtedly a global gold rush in this market – as the world gears up to store renewable energy. And in a gold rush, it's often the shovel-sellers who profit. In the case of batteries, that's the commodity suppliers, who make the batteries possible. If you want a piece of the action, [check out our guide to investing in "white diesel"](#).

We edit emails – for length, flow and Standard English (and to prevent us getting sued for libel).

*From: Derrick
Subject: Exponential – Smart Grids and Machines – The Downside*

What about the downside of smart washing machines sensing when power is readily available/cheap? I don't want washing machines noisily grinding away at 4am when power demand is low – making sleep impossible.

Will my smart fridge-freezer decide that it's more efficient to only work after midnight when electricity is cheapest? Hopefully we will be able to override the machines and switch them on when we need them.

There will likely be a range of options for electricity users, as they trade-off price and convenience. Using a wash cycle that occasionally cuts out for five minutes is little hassle – but one that runs at night may indeed annoy people. It will be up to you how much you're willing to pay.

*From: Robert
Subject: RE: [Tesla has a challenger](#)*

All looks perfect. Just tell me where can I buy those shares?!!!!

As always, the firms we feature will happily direct you to appropriate investment channel. Just drop them an email.

*From: Michael
Subject: End of Diesel*

Yes energy usage is changing, and renewables would seem to be the way forward – but many of these are intermittent and will remain so for some time. Thus I drive a diesel car which has a thermal efficiency of around 35% , if I had an electric car the energy to recharge my battery will probably come from my local coal-fired power station which has a thermal efficiency of around 30%. So, for ecological reasons, I shall stay as I am. Also, by seldom driving in towns, my pollution footprint is quite small.

Both the thermal power station and the diesel car will be on the scrap heap, in the not-too-distant future. The falling price of renewables (specifically solar+storage) is the big energy story of the next few decades. But, for out-of-town use, your diesel car will probably be a reasonable hold for a few years yet – depending on how the government legislates. But don't be surprised if your rural miles end up getting treated exactly the same as your rural jaunts.

*From: Adrian
Subject: [Redflow](#)*

Redflow! Down over the last year but do you think it's a buy and hold?
And is NEM still the new crypto to watch?

We can't comment on future stock price movement – but *Frontier Tech Investor* can. If you're ready to invest actively, that's the publication to check out. We've also got [some juicy info on cryptocurrencies](#), to help you invest sensibly.

From: Ken
Subject: [Tesla has a challenger](#)

Your article line (above) is inaccurate and misleading! Simon Hackett stated "Redflow is not really a -to- competitor with Tesla".

Of course the technologies aren't identical, in optimal scale or use case. However, there's a considerable overlap – especially for storage at scale, in hotter countries. With installations already announced in Hawaii and Australia, that's clearly a market Tesla is fighting for. Furthermore, your battery-investment dollar can only go into one of the firms – so which one are you going to back?

From: Steve
Subject: [Storage Batteries](#)

Help please!

I have solar PV panels on my roof, and an air source heat pump in my garden. I need reliable battery storage and have space in my garage. What I don't have is much faith in the reliability/longevity of li-ion batteries because they don't like the erratic charge/discharge cycle of domestic power production and use. I like sulphur-lithium types but the only firm I know of in the UK producing these, Oxis Energy, don't make for the domestic market yet. So my question is, do Redflow have a UK based provider/installer for their zinc based system I can talk to please?

By all means reach out – but Redflow makes big, bad batteries for off-grid use, and industrial-scale storage. They're very unlikely to be suitable for small-scale domestic use in the UK. Furthermore, they don't like our weather – and nor do I!

From: Ross
Subject: [Time for us to feel smug](#)

Interesting article, but really we should treat with extreme caution any attack on our physical liberty and the individual means to achieve that. The private motorcar is not going to disappear because it embodies so much personal freedom and independent capability. I am a great enthusiast of classic cars and period motorcycles. Any restriction that's unreasonable, I will simply not comply with – and many others I know personally hold similar views. Many in our hobby won't let the "Green Lobby" with their Metropolitan champagne- socialist agenda get in our way.

On a slightly different note, I am a huge supporter and small time investor in cryptocurrency for many of the reasons outlined above although in a different sector. I believe they can be a great enabler of freedom, privacy and wealth against big government. On a personal level much of the techno revolution is to be embraced and supported, however for me it is through the ideological filter that many will be tested. Small government, sound money and beneficial incremental progress are what many desire in the investment community. Although bitcoin and its contemporaries are revolutionary in many ways, within their core principles is a desire to see a return to safety and security in an ever changing and tumultuous economic world.

I hope within Southbank Investment Research liberty and freedom will be core principles that are threaded into your research and publications.

Don't worry. Not only will you very likely be able to enjoy new-found freedoms in electric, driverless Ubers shortly – but it's also unlikely that anyone will soon be scrapping your classic car. Even as a staunch believer in the right of everyone to enjoy a clean environment and a liveable climate, I'd be appalled if our classic motoring heritage got melted down.

Finally – we're certainly [very interested in cryptocurrencies](#), at *Exponential Investor*.

From: Ian
Subject: Demise of Diesel %26 Petrol

I am retired, and own a diesel car which I use for heavy lifting (from B%26Q, etc) near home and for multiple long runs to the South of France and other places in Southern Europe for periods of up to 5 weeks – typically 3,000 plus miles per trip. At present I see no realistic way that such activity can be aided by Uber or electric cars. At the very least, long runs are always likely to require hybrid vehicles. My son, living in the terraced streets of Bristol, where parking is a free for all, also drives a diesel and also takes long runs towing a caravan to Europe Although he and his wife are part of the cycling community for much of their commuting, there is no practical way in which he and his many neighbours could rely on all electric vehicles because there is no reliable way in which they could charge them. To do that you need a private drive and a cable link to the house – something that over 80% of people in most older towns will never possess. So it seems at present that electric vehicles are to be exclusive to the owners of modern detached and semi-detached property at best? What about those that also dwell in multi-storey flats with limited parking facilities? There are vast areas of the country where such services are unlikely to exist and where range is a real issue and top-up charging at service areas is never going to meet such an expanded need. Our London-centric government (and its opposite number in Paris) needs to get real and learn to deal with a range of practical solutions for which electric vehicles will only ever be part of the solution – while hybrid technologies will probably win out!

And I wonder what their plans are for aircraft, ships, long-distance heavy haulage and buses?

Each of the concerns you highlight is real, but the overall solution is a shift at the margins of all of these. Electric cars are getting cheaper and better – and range is a big part of this improvement. Charging is an issue, but public kerbside charging points are becoming slowly more prevalent. As for long-distance journeys, you're right to point out the limitations. While we're waiting for radical solutions, such as a network of hydrogen stations, on-road charging, or capacitor-powered vehicles, there's always the option of hiring a car for long journeys. As for long-distance heavy vehicles, my bet would be on power-to-fuels. Check out ITM Power, if you're interested in this market.

From: Nigel
Subject: [This man can see your future](#)

This is an interesting piece. My mother suffered from complete loss of short-term memory. Its impact was devastating in terms of her quality of life.

I am now in my late sixties. Naturally, I wonder whether what happened to my mother will happen to me. Given that there are possible ways of slowing or inhibiting the process, my personal reaction is that it is better to know whether any lapses of memory are potentially significant. For example, I frequently forget where I put my glasses! I am hoping this is not significant – but the thought does cross my mind that it may be.

Nothing wrong with getting your memory checked – or taking a DNA test, to find out what your future might hold. I feel your fear – as I've got a copy of the most important Alzheimer's gene, and I've also seen relatives fade away to confused incoherence. Here's hoping for a cure...

We don't take letters on letters – but for other feedback, write to: andrew@southbankresearch.com.

Best,

Andrew Lockley
Exponential Investor