7.18

昨天暴跌。However it was not a clear liquidation session. A lot of people who bought the morning’s fall are going to try to liquidate their short term holding today.

Be cautious in the short term and look at AM up session to start building.

Futures at the minimum position and stock position increased by 20%. Focus on the best stocks.

@ Close

Holdings very weak, cut most of the holdings. Futures trading went well.

Previously strong stocks are quickly falling apart.

7.19

Need to know that nothing happens out of the blue, there must be deeper reasons that you are able to feel.

Cai cai: she is full marketized and there are over 15 people giving her red packet. For a marketized good it is essentially winner’s curse. She made a mistake in publishing that red pocket record, which would make people realize the low marginal effectiveness of their red pockets and discourage it going forward.

W L: look at what you actually got. Look at what she wants. Through words, she is trying to inspire sympathy and get money, words are cheap though. Look at what you received and what you gave. Especially look at how she behaved before and after red pocket. Look at how she behaved when you tried to get stuff from her. Also at the beginning how she asked continuously for a certain type of gift. Very eager to make money through all means. Either through begging or inspiring sympathy. Look at what the pressure is trying to get you to do: mainly monetary. Is there a desire to find out more about who you are? Previous lies are quite rampant. Giving you tea/asking you out, or saying that there was chance to ask you out. By playing it quite confusing and make you think that you are responsible for the situation, she is trying to achieve what she wants there. Compared with E cup, there is not much in it. Remember never to give benefit of the doubt, use Occam’s razor, always look at current aggregate input vs. aggregate output. Examine pre and post money behavior, examine signs of actual investment (non verbal). Look at things that are easy to do but not done. The feeling of being used monetarily is gradual and did not build up overnight, the mistrust also built up slowly, to the point that words are no longer trustworthy, only trust oneself and don’t give benefit of the doubt.

Overall, due to fully marketization and primary motivation, this is not a good source.

Full marketization means that it is not an equal footing, from Jun it could be felt that it was not reciprocal due to attention division in a fully marketized scenario.