

My Crypto Theses

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Part I

Metaverse

- 1 Fan Tokens
- 2 Play to earn
- 3 Composable NFTs
- 4 NFT Financialization
- 5 Namespaces and Data sharing

Part II

Physically decentralized web

1 Physical network scaling

- Helium: very strong performer which bootstrapped hard hardware business model with right user economics
- Livepeer: decentralized video transcoding protocol gains traction due to rapidly growing video network
- Akash: stores docker containers at significantly reduced cost to cloud providers
- Andrena/Althea (pre-tokens) tackling internet service provider layer by enabling communities to set up hotspots and antennas that bring internet access to nearby towns

2 Decentralized storage

- IPFS: decentralized system that allows any node to store data for a limited time
- Filecoin: incentivized storage network built on IPFS
- Arweave: long-term storage with own blockchain
- Sia: on-demand storage with own blockchain.

- Filebase/Pinata: decentralized storage aggregators

Part III

DeFi 2.0

1 Algorithmic stablecoin

2 Emerging Protocol liquidity spectrum

- Olympus DAO
- Fei x Ondo Finance
- Tokemak

3 Tokenized Funds

- Bankless \$BED and \$GMI

4 Security and insurance

- Smart contract insurance (Nexus—first crypto insurance unicorn, and definitely not last)
- Verified secure smart contract libraries and security-as-a-service. (Forta)
- Perpetuity on smart contract security researched.

Part IV

ETH, Layers, Bridges

1 Liquid Staking

- Lido
- Anchor

Part V

DAOs

1 DAO investor relations

- The graph: oh-chain data

2 Test

test [test](#)

Part VI

Working-theses

1 test

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