My Crypto Theses

Contents

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 significatly 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 insurrance

- 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

test test test **BentoBox** - A new base-layer for future financial applications that Sushi intends to offer. Simply described, BentoBox is a vault that holds all assets deposited by users that can be utilized by applications built on top of it. BentoBox aims to strengthen Sushi to become the primary destination where users can interact with minimal gas and maximal capital efficiency. BentoBox can facilitate multiple transactions without having to execute multiple token approvals. Let's imagine the user approved BentoBox access to the wallet's tokens once and deposited them to the vault. The vault will allow those deposited tokens to be used across any BentoBox applications, without needing to approve the wallet's token access ever again. BentoBox optimizes for capital efficiency by implementing a yield-generating strategy to idle assets held in the vault. The strategy includes activities such as lending, low-risk yield farming, staking, and flash loans.