



VIBE.aiRforce Smart Money Analysis

Smart Money Current Activity (July 2025)



Top Smart Money Inflows (24h)

Token	Chain	24h Inflow	Sector	Market Cap
ZRO	Ethereum	\$956,249	Scaling & Oracle	\$211.5M
BONK	Solana	\$287,469	Memecoins	\$2.6B
SOL	Solana	\$228,300	L1	\$84.2B
GEN	Solana	\$71,848	-	\$28.8M
TOWER	Base	\$29,447	GameFi, NFTs	\$1.6M
FLOCK	Ethereum	\$11,806	-	\$3.4M
ORBSALUTE	Solana	\$10,011	-	\$56K
HULK	Solana	\$8,959	-	\$541K
DSTOCK	Solana	\$8,393	-	\$457K



Top Smart Money Holdings

Token	Chain	Balance USD	Holders	Share	Market Cap
LSETH	Ethereum	\$924.9M	4	19.9%	\$1.3B
ONDO	Ethereum	\$457.6M	26	9.8%	\$3.1B
UNI	Ethereum	\$412.6M	30	8.9%	\$6.0B
BGB	Ethereum	\$245.7M	2	5.3%	\$5.1B
WLD	Ethereum	\$155.4M	20	3.3%	\$2.0B
AAVE	Ethereum	\$82.3M	24	1.8%	\$4.4B

Token	Chain	Balance USD	Holders	Share	Market Cap
STETH	Ethereum	\$73.3M	23	1.6%	\$32.9B
ENA	Ethereum	\$70.1M	18	1.5%	\$3.1B
ARB	Arbitrum	\$62.5M	29	1.3%	\$2.2B
TBTC	Ethereum	\$57.6M	2	1.2%	\$651M

Recent Smart Money DEX Trades

Smart Money traders are actively trading on Solana, with a focus on:

1. New memecoin launches (NFTGUY, NIGHTCOIN, GROKA, PUGCOIN)
2. Accumulating SOL during dips
3. Taking profits on quick flips of new tokens

Chain Mindshare Analysis

Chain	Mindshare %	Change
Solana	57.6%	+9.3%
Ethereum	23.7%	-7.6%
Base	6.8%	-0.8%
Hyperliquid	4.2%	-0.8%
BSC	2.5%	+1.7%
Ordinals	1.7%	+1.7%

Narrative Mindshare Analysis

Narrative	Mindshare %	Change
Meme	27.5%	+10.6%
AI	25.2%	-16.1%
DeFi	17.5%	-4.8%

Narrative	Mindshare %	Change
RWA	12.9%	-5.1%
Altseason	5.6%	-0.0%
DePIN	3.5%	-1.0%
Play to Earn	2.9%	+2.2%
Gaming	2.7%	+0.9%
NFT	2.7%	+2.3%

Key Smart Money Insights

1. Solana Ecosystem Dominance

- Smart Money is heavily focused on Solana (57.6% mindshare, +9.3%)
- Active trading of new Solana memecoins and tokens
- SOL accumulation after recent selling pressure

2. Memecoin Resurgence

- Meme narrative has increased to 27.5% (+10.6%)
- BONK seeing significant Smart Money inflows (\$287K in 24h)
- New memecoins on Solana getting Smart Money attention

3. Ethereum Value Plays

- Smart Money holding significant positions in Ethereum ecosystem tokens
- Focus on LSTs (LSETH, STETH) and DeFi blue chips (UNI, AAVE)
- ZRO showing strongest 24h inflows on Ethereum

4. Narrative Shifts

- AI narrative declining (-16.1%) but still significant (25.2%)
- DeFi and RWA narratives showing moderate declines
- Gaming, NFT, and Play-to-Earn narratives showing growth

5. Emerging Trends

- Base chain activity with TOWER token

- Ordinals and BSC seeing increased mindshare
- New discoveries like oneshot, Ponzimon, and Imeow gaining traction



Smart Money Strategy Insights

1. **Solana Focus:** Smart Money is heavily positioned in the Solana ecosystem, with active trading of both SOL and ecosystem tokens.
2. **Memecoin Rotation:** Active rotation into new memecoins on Solana, taking quick profits while maintaining core positions.
3. **Ethereum Value Investing:** Long-term holdings concentrated in Ethereum ecosystem blue chips and liquid staking tokens.
4. **Narrative Anticipation:** Positioning for growth in Gaming, NFT, and Play-to-Earn narratives while reducing exposure to AI.
5. **New Chain Exploration:** Early positioning in emerging chains and narratives (Ordinals, BSC growth).