


Camp Kotok: Wall Street In The Woods

Excerpt from Camp Kotok: Wall Street In The Woods

by Dave Nadig at ETF.com

My experiences at Camp Kotok involve a little bit of shinrin-yoku in the literal sense: There are indeed a few hours a day floating through nature in a boat. But they also involve an intense, highly concentrated kind of economic shinrin-yoku. I surround myself with the zeitgeist and just try and absorb it through osmosis.

 *Under the rules, attendees can report specific comments with approval of the speaker (and indeed, we've included several in this week's ETF Prime podcast), or, they can report the "sense of the group."*

So here are my big takeaways, with the caveat that the group's very diversity turns any "Camp Kotok says ..." into a broad-brush synecdoche that probably says more about my listening skills than anything else.

Our Eyes Are Off The Ball

One of my parlor-tricks for large gatherings of smart people is to ask everyone the same question and then contemplate the spread of answers I get.

In the past, I've asked dumb things like "best first album" and smart things like "where's oil going and why?" This year, my question was: "What's one thing—a risk, a concern, a data point, a situation—that's really important, that the rest of

the econo-finance-sphere isn't paying attention to?"

The answers here were dizzying. While there were a few somewhat predictable answers like "we're in a corporate earnings recession and nobody's talking about it," there were also some big surprises for me...

Click the link to read Dave Nadig's takeaways:
<https://www.etf.com/sections/blog/camp-kotok-wall-street-woods>

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