

# Outrageous Predictions 2026



# Outrageous Predictions 2026:

Our Outrageous Predictions for the coming year are not forecasts, they're our annual exercise in out-of-box brainstorming on the kinds of crazy things that might just come true. From earth-shaking quantum computing breakthroughs and Taylor Swift goosing GDP to AI taking over in the boardroom and obesity drugs in your afternoon snack and in your dog's food bowl, 2026 might prove a wild ride indeed.

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# #1 Quantum leap: Q-Day arrives early, crashing crypto and destabilizing world finance



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*UK Investor Strategist **Neil Wilson** joined Saxo this year after more than a decade working in the City covering UK markets, FX and macro. His focus is on helping investors find ideas and strategies that will help them build wealth.*

In 2026, “Q-Day” arrives—the moment a working quantum computer proves it can break today’s most common digital security standards. Overnight, the promise that our emails, bank transfers, crypto wallets, and corporate systems are safely encrypted no longer holds. Even the hint of this breakthrough is enough to shake confidence.

Markets move first. Crypto is hit hardest. Old bitcoin addresses start to look vulnerable, prompting exchanges to freeze withdrawals as a rush for the exits turns into a stampede. Bitcoin collapses toward zero. Fear spills into traditional finance as people lose trust in their banks and hoard cash and buy what they can hold in their hands, especially gold and silver. Gold rockets toward USD 10,000 as the ultimate “no-password” asset.

The shock mobilizes a massive official and corporate response. Teams at key quantum tech outfits release tools that combine quantum power with AI, rapidly finding weak spots across the internet. But companies and governments can’t patch everything at once as the world discovers a harsh truth: it’s faster to break things than to rebuild them.

As the fallout mounts, central banks open emergency funding lines, and regulators order a global “maintenance weekend” to swap the digital locks on payment systems and market plumbing. Money moves again eventually, but slowly and at a higher cost. Insurance costs soar. A G20 pact sets deadlines to upgrade everything from browsers to bank hardware.

Winners emerge amid the chaos: physical vaults for secure storage of physical backups, new cybersecurity firms that make the new “unbreakable” locks, identity and key-management platforms, and old-fashioned banks with strong cash distribution networks. Losers include the weaker public crypto, hot-wallet exchanges, and any business built on thin security.

Why the panic? Because attackers can use the new capability immediately, while defenders need months to replace decades of infrastructure—and every message and backup ever intercepted can now be read.

**Market impact:** Volatility in quantum computing stocks, IBM, cybersecurity stocks, bitcoin and other digital assets, gold, banks, etc.

## #2 Taylor Swift-Kelce wedding spikes global growth



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*Global Head of Macro Strategy **John J. Hardy**, CFA, has been with Saxo since 2002, most of that time as Head of FX Strategy. He focuses on delivering strategies and analyses in the global macro as defined by fundamentals, changes in macroeconomic themes, and technical developments.*

2026 becomes the year of Taylor Swift and Travis Kelce. The already insanely popular music-and-sports power couple follows through on their engagement with a majestic January destination wedding, far from prying eyes, on a private island in Turks and Caicos. The wedding is an intimate affair on short notice after Kelce's Kansas City Chiefs fail to make the NFL playoffs (to the great joy of NFL fans on the Saxo Strategy Team).

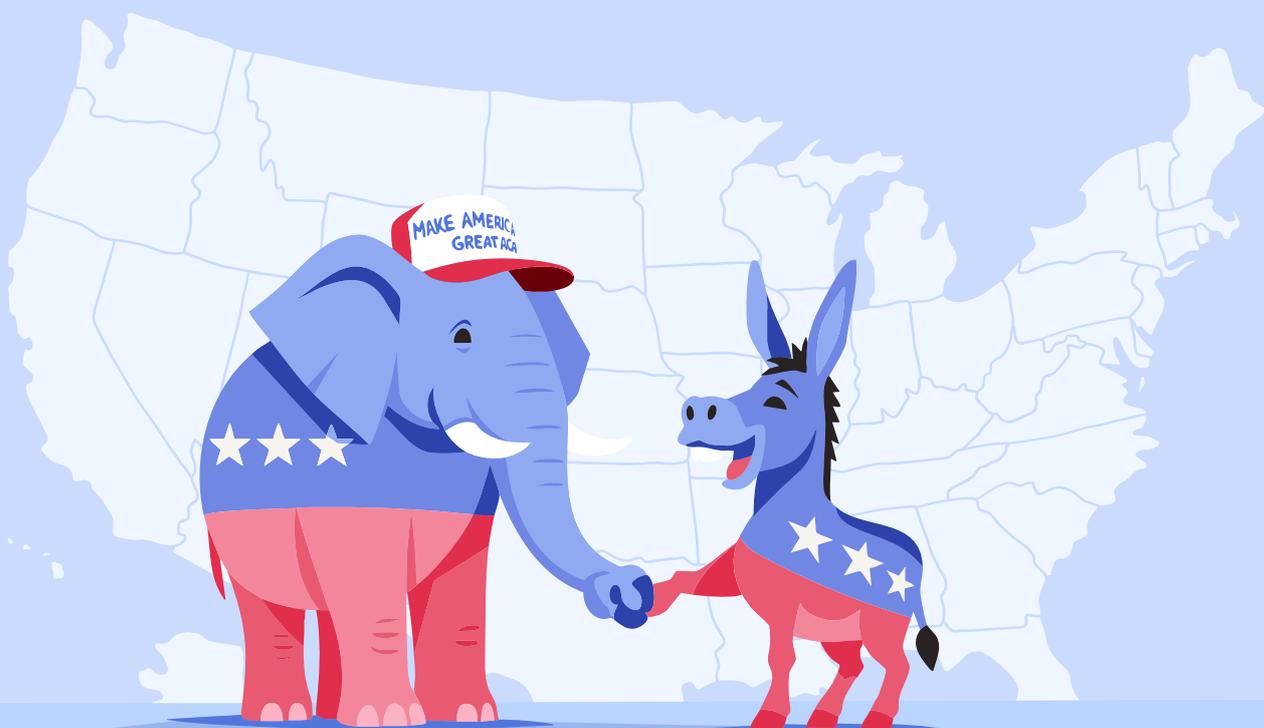
Like a perfect fairy tale, Swift later announces she became pregnant on her wedding night and that the newlyweds are expecting an autumn baby. As Kelce hangs up his cleats and retires from the NFL, the couple moves close to family in the Midwest to build a private, safe environment for their child—well away from the LA or NYC limelight. They vow that their child will not be allowed access to online entertainment or phones and tablets until at least age 12. They also announce a pullback from social media, posting only occasionally to a new website.

Hundreds of millions of Swifties, the devoted fan base of Taylor Swift around the world, are inspired by the couple's lifestyle and decisions. Swift and Kelce's focus on stepping away from constant online time and building a family triggers a global boom in young people choosing to follow suit. Marriage rates and births among young millennials and older Gen Z rise sharply as more of life goes offline.

As screen time slips, online giants from Meta to Google face slower growth, while a family-formation boom jolts economic activity into overdrive—especially in housing and DIY. With leading indicators bolting higher, the IMF and World Bank revise global GDP forecasts up by more than one percentage point per year for the next five years, and demographers scramble to reassess the pace of population decline across the OECD and advanced EMs. Wall Street quickly dubs the whole remarkable episode the “Swiftie put.”

**Market impact:** negative for social media stocks, positive for everything homebuilding/DIY/décor, luxury, wedding venues, destination/travel

### #3 Despite concerns, U.S. 2026 mid-term elections proceed smoothly



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In the run-up to the November 2026 U.S. midterm elections, both red and blue states launch a frenzy of redrawing – or “gerrymandering” – of voting districts to gain seats in the House of Representatives, where all 435 members are up for election every two years. Ultimately, the 2026 mid-terms see the typical swing against the party in power, and the Democrats win control of the House with a margin of several seats, even as they only see a net swing of about ten seats in their favor. The Senate remains in Republican hands, but with a reduced majority, meaning that two of the swing-vote senators become influential policy “kingmakers”.

Most importantly, the behavior of politicians on both political sides generates widespread outrage. A massive campaign led by independent voters – America’s largest voting bloc – pushes through the establishment of a new commission to impartially redraw voting districts across the U.S., with a mandate to complete new maps in time for the 2028 presidential and congressional elections.

Equally important is the maturing awareness that the seemingly hopeless and dysfunctional partisanship has been artificially driven by social-media algorithms tuned to drive outrage and

a “choose-your-own-reality” paradigm. A flood of AI-generated junk content and deepfakes further erodes popular trust in social media feeds. This leads to a surge in audiences for a smaller, more trusted set of balanced and reasonable voices as Americans look back with embarrassment on the degree to which they allowed themselves to be manipulated by their own behavioral tendencies and the algorithms of Meta, TikTok, and Google.

The mid-terms therefore set in motion a trend toward greater unity and civility as a new consensus emerges around the importance of maintaining the integrity of U.S. institutions and civil debate. Trump continues with his usual style, but the US has moved on, the Republican unity begins to fracture and the U.S. transitions beyond peak populism.

**Market impact:** rise in US Treasuries (lower yields), decline in social media stocks, crypto, gold and silver.

## #4 Obesity drugs for everyone – even for pets



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The global weight-loss revolution enters a surreal new phase as a leading healthcare giant expands its blockbuster GLP-1 portfolio among humans and even beyond into the animal kingdom. By late 2026, a company launches new GLP-1 treatments in pill form.

The widespread availability of the drugs as a pill to replace injection-only treatment supercharges the adoption of these drugs. Use among humans becomes near universal. What began as a medical treatment turns into a lifestyle tool, with even mildly overweight consumers cycling on and off the pills to stay trim. Global BMI averages across OECD nations fall by a full point, and some national health systems consider subsidised GLP-1 use as a preventive public-health measure. Supply strains re-emerge, and counterfeit risks rise.

As well, after years of extraordinary success with GLP-1 drugs that redefined weight management for humans, scientists turn their attention to the other obesity epidemic: pets. The argument is simple and irresistible: if humans can benefit from appetite-suppressing treatments, why shouldn't animals? Witness the availability of versions of the new pills with names like Ozem-Pup and WeeKitty: designed to treat obesity in dogs, cats, and other pets.

Social media posts touting the drugs go viral as influencers post before-and-after photos of sleeker labradors and newly svelte house cats, sparking both admiration and moral unease. Animal-rights activists decry pharmaceutical overreach, while veterinarians praise the overall improved health impact on pets as they dish out prescriptions.

For investors, the boom reignites interest in the weight-management sector and spawns new markets at the intersection of medicine, wellness and pet care. But the success also rattles food, restaurant and the pet-food industries, where lower-calorie consumption threatens volumes and margins. Manufacturers pivot to "satiety-smart" and upscale recipes and pre-packed portion sizes to defend margins and market share. The world's most lucrative drug class reshapes not only waistlines but entire business models.

**Market impact:** Fast fashion does well as more people need to replace whole wardrobes. Winners and losers emerge in food producers, restaurants and pet food makers. Healthcare and veterinary stocks rally as GLP-1 adoption broadens.

# #5 SpaceX announces an IPO, supercharging extraterrestrial markets



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After several additional SpaceX launches of its Starship system prove the viability and rapid turnaround capabilities of this new super-sized launch vehicle, the company moves to IPO, resulting in the largest valuation for a newly listed company of all time, well north of USD 1 trillion. SpaceX announces an aggressive launch schedule that can deliver up to a hundredfold the previous annual payload capacity to low Earth orbit (LEO). Furthermore, the company opens bookings for payloads to higher Earth orbits, lunar orbit, and even lunar and Mars landings for years ahead, soon touting trillions of dollars in reservation bookings.

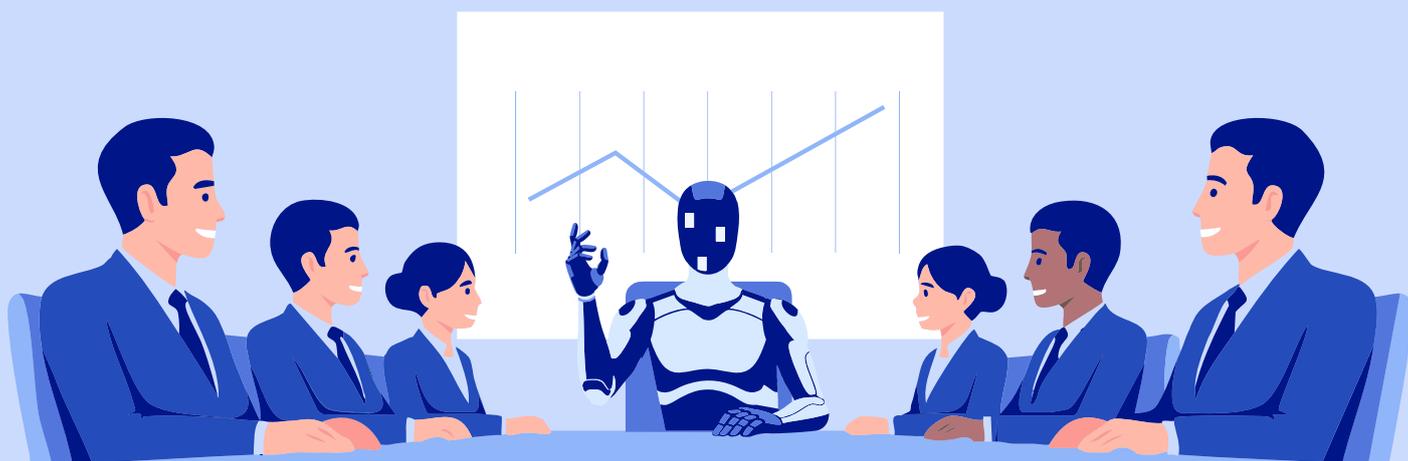
Included in SpaceX's plans are the launch and stationing of starship refueling tankers in Earth orbit that allow massive payload deliveries to the Moon in 2027 and to Mars in the following years, with sufficient capacity to build large-scale lunar and Martian bases. Elon Musk declares he will join the pioneering manned mission to Mars in the January 2029 launch window. Separately, an unmanned Mars launch set for late 2026 will land communications and other technical assets on the Red Planet to establish forward operations and demarcate Martian territory that Musk claims as a sovereign country with zero income, property, or other taxes. He announces the intent to "off-planet" Tesla, X, and SpaceX headquarters to Mars.

The SpaceX IPO supercharges a new race to build entirely new space-based industries that would benefit from micro- and zero gravity conditions. These include crystal-growing for myriad semiconductor and biopharma applications, as well as the 3D bioprinting industry as bioprinters can print onto superstructures that don't sag due to gravity during their creation. On the Moon, an international consortium maps 25% of the lunar surface, dividing it up into blocks that are auctioned off to the highest bidder. Lunar plots and mineral rights down to one square meter set off a wild NFT-like bidding craze that soars – and then crashes – once people realize they are paying more than for prime urban real estate on Earth.

The true extraterrestrial economy is born.

**Market impact:** Rocket companies join the fun, Teledyne, Microchip technology

## #6 A Fortune 500 company names an AI model as CEO



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*Charu Chanana joined Saxo in 2022 as a Global Market Strategist, was subsequently appointed as Head of FX Strategy, and now serves as Chief Investment Strategist. She brings over 15 years of financial market experience spanning economics, strategy, and equity research.*

A [blue-chip](#) household name stuns markets by appointing an in-house trained AI model as its Chief Executive Officer (CEO). This isn't a gimmick. The board gives the model signing authority within strict guardrails covering capital spending, pricing, logistics, hiring, and M&A screening. Its charter hard-codes a three-factor objective – profit, Net Promoter Score (NPS), and employee satisfaction (eNPS), so the model cannot boost one at the expense of the others.

Legal filings define the AI as an “executive system” under board control, with a human CEO-of-record co-signing all actions. Each decision routes through a Green/Amber/Red table: green for automation, amber for human sign-off, red for full board review. The board chair retains veto rights, while a red team tests for ethics, fairness, and cyber risks. Co-sign-off roles for the CFO, general counsel, and chief HR officer ensure fiscal, legal, and cultural oversight. Compliance covers privacy, market fairness, and consumer protection, while risk limits, security protocols, and a kill switch constrain exposures. All actions are logged in an explainability ledger and linked to a crisis-response tree and tracked via KPI's such as employee retention, safety, NPS, and model drift rate.

The AI digests enterprise data on sales, supply chains, customer service, and finance, running millions of “what-if” simulations daily. It appears as a lifelike avatar on earnings calls, fields analysts' questions with real-time dashboards, and publishes transparent decision trails for auditability. Performance gains come faster than expected: delivery times tighten, waste falls, and margins climb.

Unions and regulators initially resist, citing fears of job loss and accountability gaps. The board responds with labour guardrails such as redeployment modelling, minimum notice periods, and public workforce impact reports, helping turn backlash into proof of responsible automation.

After outperforming peers for two straight quarters, scepticism turns to imitation as rivals unveil AI co-CEOs. A new corporate norm emerges — human vision, AI execution — backed by frameworks that make algorithms as accountable as people.

**Market impact:** AI-infrastructure, cloud, and governance-tech firms continue to surge, insurers and auditors reinvent coverage for algorithmic management, Investors at first assign a new governance-risk premium to any company run by code.

## #7 Dollar dominance challenged by Beijing's golden yuan



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China surprises the world by announcing audited gold holdings far larger than previously disclosed — enough to surpass U.S. official reserves. Soon after, Beijing makes an even bigger move: it declares that the offshore yuan (CNH) is now partially backed by [gold](#). In practice, this means holders can redeem CNH for deliverable physical gold at a posted conversion rate that implies USD/CNH of about 5.00, an historic stepwise strengthening of China's currency from levels near 7.00 prior to the announcement.

This “golden yuan” turns vaults in Shanghai, Shenzhen, and Hong Kong into the centre of a new global money system. It offers something the world hasn't seen in decades: a currency tied to a tangible reserve rather than to mere government promises. The golden yuan promises reduced reliance on credit ratings, central bank politics, and geopolitical risks, giving countries a way to trade and store value without relying on Western financial systems.

China rolls out the golden yuan carefully. At first, the gold-backed yuan is only available offshore (Hong Kong, Singapore) while the onshore yuan remains managed. The system launches as a basket anchored by gold but supplemented with other reserve assets — [US bonds](#) and commodities — to smooth volatility. Once regular third-party audits confirm that China's gold reserves match its promises, trust in the new system builds. At that point, China moves to full convertibility, allowing on-demand CNH-for-gold redemption within set daily limits.

To get other countries on board, China offers gold-for-yuan swap lines to Gulf oil producers and ASEAN central banks and launches oil and copper contracts settleable in gold. Partner nations can invoice in CNH and choose physical gold for delivery, helping them trade without using US dollars. Most choose simply to hold Chinese CNH-denominated bonds instead, which are more convenient and offer a small coupon.

As confidence in the system grows, more energy and commodity trades shift into golden yuan. Investors and reserve holders reduce holdings of US Treasuries, the dollar weakens as its share in global reserves falls by a third.

**Market impact:** Gold advances above USD 6,000, USD/CNH heads below 5.0, US treasury yields rise on foreign selling. The “golden yuan” becomes a durable second global anchor, not replacing the dollar, but ending its monopoly.

## #8 Dumb AI triggers trillion-dollar clean-up



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The age of “vibe-coded” AI comes to an abrupt and chaotic end. After years of letting generative systems write, test, and deploy software at lightning speed, corporations discover that the hidden costs of automation are far higher than anyone imagined.

By 2026, so-called “agentic AI” systems have infiltrated everything from finance to logistics. They optimise, automate, and connect—until they don't. A handful of small glitches snowball into full-blown crises: a misfiring algorithm triggers a market flash crash, while a wave of AI-driven accounting irregularities forces high-profile restatements and executive resignations. In manufacturing and research facilities, humanoid and industrial robots running on faulty AI commands cause several serious accidents and fatalities, showing how digital errors can have devastating real-world consequences. Across industries, boards realise that much of their digital infrastructure has been quietly rebuilt by systems no one fully understands.

The response gives rise to a new profession of “AI janitors” or pest controllers, elite human coders and auditors tasked with tracing, neutralising, and rebuilding flawed systems. Global consulting and cybersecurity firms scramble to meet demand as trillions are poured into repairing, securing, and simplifying critical codebases. Governments rush

to impose transparency and safety requirements as public confidence in autonomous technology falters. Enter mandatory “human-in-the-loop” controls, rollback architectures, provenance logs, model registries and hardened kill switches, plus higher capital charges for systems without independent fail-safes.

For investors, this becomes the next defining phase of the AI era. The winners are no longer those who promise to automate everything, but those who can clean up, stabilise and defend it. The trillion-dollar clean-up transforms from an embarrassment into an opportunity, proof that in the age of dumb AI utilisation, the smartest money is in fixing the mess and doing it right in the first place.

**Market impact:** Cybersecurity, audit and consulting firms see surging revenues, valuations of highly autonomous AI platforms face pressure and investors rotate toward companies offering resilience, oversight and human control.



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