February 2026 Investor Update

To schedule a discussion, please reply at your convenience.
Cryptocurrency investment is a MUST in every portfolio.

ProChain in the News

X

David Tawil (**@DavidDTawil**) broadcasts daily on **X** (**Twitter**) at **8am ET.**
He is the co-host of **#FinanceDaily**, the most listened-to, live, daily finance program on **X**.

1. **Adoption**

Investment.

- **Mubadala Investment Company**, the Abu Dhabi sovereign wealth fund, and Al Warda, an arm of the Abu Dhabi Investment Council (ADIC), increased their holdings in BlackRock's **Bitcoin ETF** (**IBIT**) during Q4, as revealed in recent 13F filings.
    - *ProChain*- Institutional adoption of anything, especially a new asset-class, happens at a snail's pace. This news is confirmation that institutional adoption and investment is continuing despite, or in spite, of recent digital asset price action.

2. **Regulation and Legal**

- The **SEC**'s seemingly minor accounting rule requiring banks to hold ONLY 2% capital against **stablecoin** exposure should radically increase institutional adoption of stablecoins, since it alters the current rule which requires a punitive **100%** haircut.
- Traditional banks have renewed their arguments against reward-bearing/yielding **stablecoins**.
    - **JPMorgan** CEO Jamie Dimon argued that stablecoin issuers passing yields to customers should be subject to the same regulatory rules as banks.
    - *ProChain*- These arguments and the resolution thereof are front-and-center with respect to Congress' passing of the CLARITY Act, which addresses digital asset market structure.
- **Kraken** has become the first crypto firm to gain access to the Federal Reserve's core payments infrastructure, marking a major milestone for crypto's integration into traditional finance. The 'master account' approval gives Kraken access to the same payment rail as thousands of U.S. banks and credit unions.
    - *ProChain*- On multiple levels, the digital asset industry is on the attack against traditional banking, for the overwhelming benefit of depositors. Digital asset issuers will offer depositors (i) full-reserve banking (not fractional); (ii) 24/7 access and money movement; (iii) lower costs; (iv) greater security; and, (v) better yield/return/reward.

3. **Public Companies**

- **Coinbase** (**COIN**) has partnered with **Yahoo Finance** to offer stock trading, rolling out the feature to all US users as it expands beyond crypto.

- The **NYSE**'s parent company **ICE** has made a strategic investment in crypto exchange **OKX** at a $25 billion valuation, as both firms explore tokenized stocks.
    - *ProChain*- Increasingly, we are witnessing the convergence of the broker/exchange/marketplace for all digital assets- stocks, bonds, options/derivatives, digital assets, prediction markets, betting/gambling, NFTs, etc., and, with a race to the bottom on pricing/cost, only the largest and strongest will survive.

ProChain CAPITAL

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