

OIL & GAS COUNCIL
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INVESTOR PODCAST

Adam Waterous interviewed by the Oil & Gas Council

Adam Waterous – CEO of Waterous Energy Fund joins us to discuss his theory of “Peak Permian”, which describes current US production levels as unsustainable and grossly uneconomic. During the episode, Adam explains how the emergence of unconventional fracking technology has caused a structural shift in the oil & gas industry, thus leading to the destruction of M&A demand and a call for change in the industry’s current operating and investment models. With the effects of COVID-19 & the Oil Price War in full force, Adam describes how his theory of “Peak Permian” is not only being validated but also sped up.

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