

Forum: [Hack Forums](#)

Thread: [Willy Woo Sold Most of His Bitcoin. Has the Smartest Guy in On-Chain Gone Off-Chain?](#)

JoseMar - July 15, 2025, 5:53 pm

Willy Woo Sold Most of His Bitcoin.

Has the Smartest Guy in On-Chain Gone Off-Chain?

Alright, let's sit with this one for a sec.

Willy Woo, the same guy who basically helped half the internet understand Bitcoin on-chain metrics, has sold most of his stack. Not a few sats. Not a tiny percentage. Most of it.

He's not rage-quitting. He's not saying Bitcoin's dead. Actually... quite the opposite. He's just playing a different game now.

Let's be real: this sounds crazy at first. I mean, this is Woo. The man made a career out of understanding Bitcoin better than most of us ever will. If he's selling, what does that say about Bitcoin?

But here's where it gets interesting. He's not cashing out to go buy a yacht or flee to a tax haven. He's reinvesting in infrastructure. He thinks building the roads and bridges around Bitcoin will outperform holding Bitcoin itself.

Think about the gold rush cliché. Everyone remembers the miners, but the ones who really made bank were selling the shovels.

That's Woo's thinking in a nutshell. Bitcoin might still 50x from here. But some early-stage infrastructure startups? They could 100x. 1000x. Maybe more, or maybe burn entirely. That's the tradeoff.

And yeah, even if they flop, many of them still hold Bitcoin anyway, which kinda softens the blow.

He's not giving up on BTC. He's just trying to compound in a smarter way. That's the angle.

It's funny, Woo started as a startup guy even before Bitcoin was a thing. The OG hustle. Back in 2014, he found himself at a random meetup in Bali (because of course), got orange-pilled, and basically never looked back.

Since then? He gave us things like the NVT ratio and the "Supply Shock" model. Tools that changed how people track Bitcoin, without needing to squint at messy charts all day.

And even with his fame, he never fully leaned into the influencer role. Turns out, being "crypto famous" is weird when people start asking what school your kid goes to. He pulled back. Focused on family. Skipped interviews. Honestly? Respect.

So now, here we are, 2025, and Woo's making the next big shift. He's not holding heavy bags anymore. No need to worry about opsec or waking up at 3 a.m. to check his multisig. He's betting on builders.

And yeah, one of his biggest wins so far? Exodus Wallet. He got in at seed round in 2016. Clean UX, solid business model. Fast forward, it IPO'd on the NYSE. It's worth almost a billion today. Not bad for a wallet play.

New entry for [7](#)contest?

? Big shoutout to [6](#) for making this even more exciting?

Hey guys, check this out.?

[DemonAsylum](#) [Chrome](#) [Beherit](#) [Deany](#) [Prettykitty](#) [Dystortion](#) [The Tor](#)

Let's pause here.

Because a lot of people, especially newer to the space, might look at this and think, "Wait... should I sell too?"

Here's where you've gotta stay grounded: Woo isn't just rotating into magic beans. He's not chasing memecoins or TikTok hype. He's being strategic, patient, and playing with connections most retail investors simply don't have. These startup allocations? You don't just walk into them. They're invitation-only, trust-heavy, capped tables.

Woo even admits it: it's hard to get in. But when you do? It's asymmetric as hell.

He's also still watching Bitcoin closely. Like, very closely. His charts suggest the market's still misreading current price action. Even with BTC hitting new ATHs, the pace has been slower than people hoped. Why?

Well, OGs are selling. A lot.

Think of it this way: someone who bought BTC at \$1 is now selling at \$100K. That's \$99K of new money needed just to buy that bag. Multiply that across the entire early adopter class. That's a ton of new capital needed just to keep things stable, let alone rising.

But Woo's optimistic. He thinks we're absorbing that sell pressure. Slowly. And when the OGs run out of ammo? That's when things could get... well, explosive.

As for retail? He's less convinced about some massive FOMO wave. Retail just doesn't have the billions per day that institutional players do. The next leg up? It's more about strategy than hype.

Woo even joked that a \$1M Bitcoin price might actually be pessimistic, at least when adjusted for inflation. He sees BTC hitting anywhere from \$1M to \$10M in the next 10–20 years. ? In today's dollars. Which is wild to consider.

But he's not blind to the risks. He's skeptical of Bitcoin treasury companies. Says the trend reminds him of the 2017 ICO bubble, insider access, shady mechanics, overhyped promises. He's betting more on real utility than flashy plays.

He recently backed a company called Debifi. Think: lending platform that lets you borrow fiat without giving up control of your private keys. It uses a clever multi-key escrow system. Promotes self-custody. Which is kind of ironic, given that Woo doesn't even self-custody his own BTC anymore. But hey, at least he admits it.

His logic? Companies often have better security ops than individuals anyway. Especially individuals trying to sleep at night.

So what's the takeaway here?

Woo hasn't lost faith. He's not bearish on Bitcoin. He's just... adapting. Evolving. Playing the meta game.

He's choosing to be early again, not just to a coin, but to the next wave of what supports the coin.

You don't have to agree with him. You don't have to follow his lead. Honestly, most of us couldn't even if we tried.

But it's worth thinking about what his move really means: The Bitcoin dream is no longer just about holding. It's about building too.

And maybe that's the future more of us need to start imagining.

Let me know your thoughts. Would you ever sell most of your BTC if you thought you could 100x it elsewhere?

Or is this just another cycle where even the legends get bored and shift lanes?

Zher0 - July 15, 2025, 8:34 pm

I was not aware of Willy Woo. This was a great read, thank you for putting this together. Any ideas for the next infrastructure play?

Secrets - July 15, 2025, 10:25 pm

Nice read, kept me entertained. Very nice.

JoseMar - July 16, 2025, 1:37 am

(Jul 15, 2025 08:34 PM)Zher0 Wrote: [\[CITE\]](#) I was not aware of Willy Woo. This was a great read, thank you for putting this together. Any ideas for the next infrastructure play?

(Jul 15, 2025 10:25 PM)Secrets Wrote: [\[CITE\]](#) Nice read, kept me entertained. Very nice. Thanks! Glad it was helpful ?

For next plays, I'd keep an eye on things like self-custody tools or infra that helps crypto scale quietly (like on-chain credit or multi-key lending).

Not sexy, but real.?

If you had to bet on one "boring" but useful crypto tool, what would it be?