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Thread: [Altcoin Season Returns? ETH Treasuries Growing, BTC Dominance Falling](#)

JoseMar - July 21, 2025, 8:15 am

Altcoin Season Returns?

ETH Treasuries Growing, BTC Dominance Falling

You don't often see Bitcoin's dominance slipping without the market panicking. Actually, the opposite, it's like people are kind of cool with it. Or maybe the interest is shifting. Altcoins are slowly creeping back into the spotlight, not just on CoinMarketCap charts, but into the hands of bigger players.

I read a piece today on CoinDesk and other websites that captured that shift perfectly. It's not an official "altcoin season" announcement (whatever that would even look like), but something's definitely moving. ETH is starting to be seen as a real treasury asset. Bitcoin's market share is slipping. And smaller chains, Solana, Avalanche, others, are waking up.

So naturally, I started thinking: Is this the beginning of the next cycle?

And if it is... what's our move?

Let me walk through how I'm seeing it, maybe it'll resonate.

What CoinDesk and other top sources are saying lately (and Why It Matters)

The article's pretty straightforward: companies are beginning to hold Ethereum in their treasuries. Like not just trading it for gains, but actually treating it like a core reserve asset. That's huge. It's the kind of institutional shift ETH needed to break out of Bitcoin's shadow.

At the same time, Bitcoin dominance has dipped below 53%. That might not sound dramatic, but in crypto, these kinds of metrics are like... gut feelings. You just feel the shift coming before headlines catch up.

They also points out that L1 coins, SOL, AVAX, and similar, are showing signs of life. And they're right. It's not just hype. You can see early signs in volume, capital rotation, and subtle sentiment changes.

Altcoin Season? Kinda, Sorta, Maybe

Let's be honest: people throw around "altcoin season" like it's candy. And because of that, it's lost a bit of weight. But if you've been in this space through a few cycles, you start recognizing patterns.

Classically, altcoin season means: BTC stabilizes or slows down

ETH outperforms

The rest of the market follows, either with moonshots or glorious collapses

Right now? Feels like we're in phase 2. ETH is stretching its legs, and other tokens are starting to gather momentum.

That said, I don't think this will be a copy of 2021. The market's different now. More mature, but also more skeptical. People aren't jumping into every token with a dog logo just because a TikTok says "1000x soon" (okay, well... most people aren't).

Coins to Watch (But Keep a Grain of Salt)

Alright, if we're here, let's do the obvious: What coins could benefit if this trend holds?

This is not financial advice. Just sharing how I'm thinking about the market and where momentum might go. ETH – the obvious pick. If companies start holding it in treasury and we get a spot ETF? Game on.

SOL – love it or hate it, Solana's been resilient. Strong community, fast tech, and occasional delivery.

AVAX, NEAR, ATOM – all have growing ecosystems but less hype lately. That can change quickly if capital flows shift.

AI-related coins – FET, AGIX, Ocean, etc. Yes, it's mostly narrative-driven, but hype moves markets faster than fundamentals.

Underrated small caps – now's the time to dig. Look for coins with growing volume and decent liquidity that haven't pumped (yet). Maybe something ZK-related, maybe gaming/metaverse projects that didn't die completely.

Important to read: "altcoin season" doesn't mean everything pumps. It means some coins go 5x and others quietly bleed while nobody looks. Timing is brutal. Sometimes you FOMO into the top without realizing it.

New entry for [7](#) contest?

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

Hey guys, check this out.?

[DemonAsylum](#) [Immortal](#) [I N C R E D I B L E](#) [itcorp](#) [Jen](#) [vyactor](#) [Dystortion](#)

So... What Do We Actually Do With This?

I think this is a good time to reevaluate your portfolio, not to panic sell or ape into random stuff, but

just to ask yourself: "What am I holding?"

"Why am I holding it?"

"If the market pops, do I even want to be in this?"

Also: prep your emotional responses.

Because if altcoin season does take off, you'll see +300% days on tokens you've never heard of. You'll feel late. You'll want to chase. You'll wish you went harder.

But honestly? The people who do best during these runs are usually the ones who already had a plan. Who didn't react impulsively. Who understood that not catching the absolute top is fine, and not catching every pump is normal.

If you've read this far, I'm curious, what coins are you eyeing right now?

Do you think this is the beginning of a new cycle, or just a colorful sideways phase?

6 - July 21, 2025, 8:59 am

You have some very great thread contributions this past week [JoseMar](#)

Keep up the momentum and dedication.

A Legend will forever be a Legend