Smart Money Flows

TOP ACCUMULATION (7D)

ANSEM +$228.9K

Solana · $77M · Memecoins · theweek's largest net smart-money inflow, spread across 46 SM holders — the broadest base on the board. But price slipped −5.2%, so flow and breadth lead while price lags: accumulation *into* weakness.

TOP DISTRIBUTION (7D)

PENDLE −$4.1M

Ethereum · $237.3M · DEX / Yield · byfar the sharpest outflow on the board, roughly 3× the next name. Smart money exited ~$4M into a flat price (+0.8%) — a deliberate, clean de-risk of a blue-chip yield token.

CLEANEST 7D BUILD

CDXR +1.2%

Ethereum · $33.7M · the rarename where a net inflow (+$122.1K), a positive price and no distribution footprint all point the same way. The cleanest alignment on the board — modest, and on a narrow holder base.

LARGEST SM HOLDING

UNI ±0.0%

Ethereum · $164.1MSM · 29 holders · 40.8M tokens held unchanged for the entire week. The largest measurable (non-native) position on the board, and it did not move once.

SECTOR MOMENTUM

Frozen core

Blue-chip spot (UNI, ONDO, WLD, STETH) is net ~0.0% for the week; the only decisive flows are *out* of yield, lending and gaming. There is no sector-wide build anywhere on the board.

RISK SIGNAL

Pump & distribute

STONK (+4,131%) and CYS (+220%) both printed vertical price moves while smart money net *sold* into them (−$185K, −$74K) — flow running opposite to price, i.e. distribution into retail momentum.

SM ACCUMULATION LEADERS

Net 7-day smart-money DEX flow (buys − sells) · 4 Aug – 10 Aug

#	TOKEN	CHAIN	SECTOR	7D SM FLOW	PRICE 7D	MKT CAP
1	**ANSEM**	Solana	Memecoins	+$228.9K	−5.2%	$77.0M
2	**CATE**	Solana	Memecoins	+$155.4K	−47.6%	$21.4M
3	**CDXR**	Ethereum	—	+$122.1K	+1.2%	$33.7M
4	**JACKET**	BNB	Memecoins	+$73.7K	+16.4%	$7.4M
5	**ESPORTS**	BNB	GameFi	+$48.3K	−0.6%	$2.6M
6	**IDOL**	BNB	—	+$44.4K	−17.9%	$32.0M

This week's accumulation book is even thinner and messier than last week's. The single largest net inflow is ANSEM (+$228.9K on Solana), but it came with a −5.2% price and the two next names — CATE (−47.6%) and IDOL (−17.9%) — are being bought into falling prices. CDXR (+$122.1K, +1.2%) is the one name where flow and price agree, though on a narrow base. There is no high-conviction, all-three-agree build the way WINDTERM was last week — the biggest builds this week are knife-catches, not confirmations. No blue-chip accumulation of scale anywhere — every major is frozen (see core positions).

TOKEN	CHAIN	SECTOR	7D SM FLOW	PRICE 7D	MKT CAP	SIGNAL
PENDLE	Ethereum	DEX / Yield	−$4.1M	+0.8%	$237.3M	Largest SM outflow on the board · yield blue-chip de-risked
BEAM	Ethereum	GameFi	−$1.4M	−5.0%	$70.5M	Gaming name sold into a soft week
SYRUP	Ethereum	DeFi Lending	−$837.5K	−0.3%	$190.3M	Money-market name trimmed hard into a flat tape
FWA	Ethereum	AI Agents	−$344.1K	+67.6%	$23.4M	Sold into a +68% spike · pump distributed
MARSCOIN	BNB	Memecoins	−$271.4K	+79.8%	$58.9M	Fresh-launch spike distributed the same week
STONK	Solana	Memecoins	−$185.1K	+4,131%	$8.8M	Vertical pump · net sold into retail
ENA	Ethereum	Stablecoin Issuer	−$160.9K	−0.4%	$883.9M	Largest-cap name in the book · being trimmed

The distribution book dwarfs the accumulation book this week, and it is led by one name: PENDLE (−$4.1M) is roughly three times any other outflow — a clean smart-money exit into a flat price. The rest splits into three themes: yield / DeFi majors (PENDLE, SYRUP) and stablecoin/lending (ENA) being de-risked; gaming (BEAM −$1.4M) sold into weakness; and memecoins (STONK +4,131%, MARSCOIN +79.8%, FWA +67.6%) where smart money sold into vertical price spikes rather than chasing them. Native majors (HYPE, MON, SOL) cannot be measured via spot flows and do not appear here.

SECTOR ROTATION

DEX / DeFi Majors
flat

UNI ($164.1M) held 40.8M tokens unchanged all week — the largest measurable single SM position and completely static.

Yield & Restaking
net distribution

The week's dominant exit theme: PENDLE −$4.1M and SYRUP −$837K out on Ethereum. Smart money is de-risking yield and restaking venues.

RWAs
flat

ONDO ($103.2M) held flat for the full seven days; USTB ($17.4M) also frozen. The second-largest leg of the core book, parked.

Lending / Stablecoin
net distribution

SYRUP −$837K and ENA −$161K net-sold, plus a MORPHO trim. Money-market and stablecoin-issuer names sold across the cluster.

Identity / AI
flat

WLD ($74.7M) net ~0.0% — held, not added; balance unchanged for seven days across 20 SM holders.

Gaming & Memecoins
mixed

BEAM −$1.4M out, but ANSEM +$229K, CATE and JACKET specks in. Memecoins show pump-distribute (STONK, MARSCOIN). Direction is split.

NOTABLE PATTERNS THIS WEEK

- **PENDLE is the single clearest signal of the week — and it's a sell.** Smart money pulled ~$4.1M out of PENDLE on Ethereum, roughly 3× larger than any other flow on the board, into a flat price. When one exit dwarfs everything else, it is usually the read that matters.
- **The blue-chip core is frozen again.** UNI ($164.1M), ONDO ($103.2M), WLD ($74.7M) and STETH ($15.7M) each net ~0.0% over seven days — zero net tokens in or out. The largest measurable positions did not move once.
- **Last week's clean build round-tripped.** WINDTERM — Week 31's one all-agree build (+168%) — is −70.5% this week and now net sold (−$41.8K). A reminder that single-week vertical moves rarely hold, and confirmation of last week's "watch whether it holds" flag.
- **Distribution is concentrated in yield, lending and gaming, not spot majors.** PENDLE + SYRUP (yield / lending), ENA (stablecoin issuer) and BEAM (gaming) account for most of the week's outflows. Smart money is trimming DeFi-yield venues while leaving spot blue-chips untouched.
- **Memecoins show a pump-and-distribute footprint.** STONK (+4,131%) and CYS (+220%) both printed vertical moves while smart money net sold (−$185K, −$74K); MARSCOIN (+79.8%) and FWA (+67.6%) repeat the pattern. Flow runs opposite to price — distribution into retail momentum, not conviction.

LARGEST SM HOLDINGS (CORE POSITIONS)

Largest measurable smart-money positions · 7-daydirection

TOKEN	CHAIN	SECTOR	SM BALANCE	7D Δ	HOLDERS	MKT CAP
HYPE	HyperEVM	L1/L2	$185.4M	native — n/a	46	$12.2B
UNI	Ethereum	Decentralised Exchanges	$164.1M	±0.0%	29	$2.5B
ONDO	Ethereum	RWAs	$103.2M	±0.0%	16	$1.7B
MON	Monad	L1/L2	$83.2M	native — n/a	34	$258.3M
WLD	Ethereum	Identity / AI	$74.7M	±0.0%	20	$1.2B
MORPHO	Ethereum	DeFi Lending	$17.3M	−0.4%	6	$1.3B

The measurable core is frozen. UNI, ONDO and WLD each held their token balances flat for the full week; only MORPHO (−0.4%) shows any drift, a mild trim. The two largest balances overall — HYPE ($185.4M) and MON ($83.2M) — are native L1 tokens whose 7-day direction cannot be read through spot flows, so they are shown for size but marked n/a for direction. Balances and holder counts use the smart-traders-and-funds segment and differ slightly from the flows segment used in the accumulation and distribution tables.

HIGH-CONVICTION SM WATCHLIST

Investor watch list — tokens worth tracking into Week 33

SPOT DISTRIBUTION

PENDLE −$4.1M

Ethereum · DEX / Yield · the board's largest single-name exit, sold into a flat price. Watch for continuation vs. a washed-out reversal.

CLEAN(ISH) MOMENTUM

CDXR +1.2%

Ethereum · $33.7M · +$122.1K inflow with a positive price and no distribution — the cleanest alignment on the board, though narrow. Watch for follow-through.

FROZEN ANCHOR

UNI ±0.0%

Ethereum · $164.1M · 40.8M tokens unchanged all week. The largest measurable position and the tell for any thaw in the core book.

TOP INFLOW

ANSEM +$228.9K

Solana · $77M · the week's biggest net smart-money inflow across 46 holders. Watch whether the build extends and whether price follows.

LARGE-CAP TRIM

ENA −$160.9K

Ethereum · $883.9M · the only sizeable-cap name in the distribution book (−$161K). Watch whether the trim deepens.

YIELD / LENDING EXIT

SYRUP −$837.5K

Ethereum · $190.3M · −$837K smart-money exit into a flat week. A lead read on DeFi-yield and money-market de-risking.

RISK FLAGS

TOKEN	CHAIN	NOTE	FLAG
PENDLE	Ethereum	−$4.1M SM outflow into a flat price · the largest single-name exit on the board	High
STONK	Solana	+4,131% price with net SM selling (−$185K) · fresh-launch pump distribution	Watch
MARSCOIN	BNB	+79.8% price but −$271K net SM outflow · pump distributed, not accumulated	Watch
CATE	Solana	+$155K accumulated into a −47.6% crash · knife-catch, flow vs price diverging	Watch
WINDTERM	Base	−70.5% · last week's +168% build round-tripped and is now net sold (−$41.8K)	Watch
BEAM	Ethereum	−$1.4M into a soft week · gaming de-risking	Monitor
Yield / Lending cluster	Ethereum	PENDLE + SYRUP + ENA venues net-sold · broad DeFi-yield de-risking	Monitor

Source: smart-money segment (smart traders and funds; excludes whales, large holders and public figures). 7-day window ≈ 4 Aug – 10 Aug 2026. Accumulation and distribution figures are net smart-money DEX flow (buy volume − sell volume) in USD over the window; core-position balances and holder counts are current snapshot values. Native tokens (HYPE, MON, SOL) cannot be measured via spot flows and are excluded from the flow tables. Several micro-caps saw 80–4,000%+ price moves over the window, so flow and price can diverge. Recreated in the altFINS "Smart Money Flows" format for Week 32; figures use a different data source and smart-money definition from earlier reports and are not directly comparable. Not investment advice.