

Research Unplugged: Energy & Materials: Key Themes & Stocks: TSLA, Canadian Oils, Utilities, WOLF & Nat Gas

In this podcast, we listen in as members of our Energy, Materials, and Industrials research team – including Neil Mehta, Duffy Fischer, Mark Delaney, Carly Davenport, Brian Lee, and Daniel Moreno – join Sarah Herr to discuss highly debated stocks and themes across the energy, materials, and industrials complex.

The full list of speakers topics is below, with approximate start times in parentheses.

Speakers & Topics

(0:28) Spotlight on: EVs & TSLA

- Mark Delaney – Head of US Autos & Industrial Tech Research

(5:25) Spotlight on: Canadian Oils

- Neil Mehta – Head of Americas Natural Resources Equity Research

(9:22) Spotlight on: Utilities & Grid Reliability

- Carly Davenport – Head of Americas Utilities Research

(13:30) Spotlight on: WOLF

- Brian Lee – Head of US Clean Technology Research

(18:56) Spotlight on Natural Gas

- Daniel Moreno – Natural Gas Commodities Strategist

(22:15) Looking ahead: where to focus in Materials

- Duffy Fischer – Head of US Chemicals Research

(25:08) Looking ahead: where to focus in Natural R

- Neil Mehta – Head of Americas Natural Resources Equity Research

Moderator:

- Sarah Herr – US Research Merchandising

Sarah Herr

+1(212)357-0094 | sarah.herr@gs.com
Goldman Sachs & Co. LLC

Neil Mehta

+1(212)357-4042 | neil.mehta@gs.com
Goldman Sachs & Co. LLC

Duffy Fischer

+1(713)654-8480 | duffy.fischer@gs.com
Goldman Sachs & Co. LLC

Mark Delaney, CFA

+1(212)357-0535 | mark.delaney@gs.com
Goldman Sachs & Co. LLC

Carly Davenport

+1(212)357-1914 | carly.davenport@gs.com
Goldman Sachs & Co. LLC

Brian Lee, CFA

+1(917)343-3110 | brian.k.lee@gs.com
Goldman Sachs & Co. LLC

Daniel Moreno

+1(212)934-1001 | daniel.moreno@gs.com
Goldman Sachs & Co. LLC

Chris Hussey

+1(212)902-7564 | chris.hussey@gs.com
Goldman Sachs & Co. LLC

Relevant Research:

- [US Autos & Industrial Tech: 1Q24 preview - Positioning for slower BEV and strong datacenter sales; Downgrade ST, CHPT](#)
- [Americas Utilities: Initiate coverage on six utilities: Grid reliability exposure on sale; Buy PCG, FE, ES; Sell AEE; Neutral EIX, WEC](#)
- [Wolfspeed Inc. \(WOLF\): F3Q24 \(Mar\) Preview: Focus on positive progress on Mohawk ramp-up and financing visibility; Buy](#)
- [Natural Gas: US production curtailments reduce the risks of congestion in 2024](#)
- [Commodity Views: Cyclical Risks Fading, But Stay Selective](#)
- [Energy, Utilities & Mining Pulse: Investors Asking: What Companies Have Leverage to Improving Long-Term Energy Demand Expectations?](#)

Previous Podcasts:

- [Research Unplugged: Energy & Materials: Key Themes & Stocks – CCJ, UPS, XEL, European Chemicals & Landfill Gas](#)
- [Research Unplugged: Energy & Materials: Top Themes & Stocks – Takeaways from Chems Bus Trip, NOVA, BG & Oil Refining Best Ideas](#)
- [Research Unplugged: Energy & Materials: Key Themes & Stocks – Air Products, SLB, “Electrification” of Industrials & Kinder Morgan](#)



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