

Research Unplugged: US Autos: Platforms, Power, and the Road From Here

Platforms & Power Driving Industrial Tech Profits [Explore >](#)



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In this podcast, we listen in as Mark Delaney discusses a key theme underpinning his coverage: the rising role of platforms (the platforms underlying vehicle hardware as well as vehicles as a platform for software & services) and power (power efficiency in cars and datacenters) driving the next wave of profitability and innovation, akin to the Tech transition experienced by Apple (AAPL) and Microsoft (MSFT). We also dig into what we learned from Tesla's (TSLA) Oct-10 Robotaxi/We, Robot event and General Motors' (GM) Oct-8 Investor Day; the latest in auto sales trends; plus our focus on platforms and power as the keys to finding alpha in the sector ahead.

Speaker:

- Mark Delaney – US Autos & Industrial Tech Analyst

Moderator:

- Sarah Herr – US Research Merchandising

Relevant Research:

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- [US Autos & Industrial Tech: 3Q24 earnings preview](#)
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- [Global Automation: Humanoid Robot: Greatly enhanced dexterity and robustness from Tesla's Optimus live demo; Buy HDS/Sanhua](#)
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