

hey everyone meet kevin here in this video we're going to use the level 99 coffee drinking cup to talk about which stocks we might want to consider buying in the event that joe biden's infrastructure plan does actually pass obviously joe biden has introduced his infrastructure plan today or at least part one of it the actual infrastructure part not the social infrastructure part and the actual infrastructure part calls for billions upon billions of dollars 2.25 trillion in total with a lot of money going to ev incentives tax credits solar incentives uh incentives for creating up to 500 000 charging stations electrifying the federal fleet of vehicles electrifying school buses folks you name it and in this video my goal is to provide an outline of potentially which stocks you might want to look into now this is not going to be an epic deep dive on every single one because otherwise this video would be two or three hours long maybe we'll do individual analyses on these if you'd like that i'd gladly do that now let me know down in the comments but for now i'm going to give you an overview so we can get started the first way i like to get started is by talking about obviously electric vehicle chargers here's the thing when it comes to electric vehicle chargers a lot of them kind of still suck right now and what i found the best thing to do is at least what's worked well for me is just buying a basket of chargers so think of it kind of like an index funder an exchange traded fund but just for charging companies now i used m1 finance to put this together so they don't let me use everything but uh or put every kind of uh you know possible charging stock that's available in here but i was able to put a good chunk in

and so what i did is on monday
which was arguably the bottom of the
market for charging stocks
uh we'll just call that luck uh but
anyway i put a hundred thousand dollars
into the chargers
and on a pie of six stocks i'm up
thirteen thousand dollars in two days
which is awesome and certainly no
guarantee of future performance
but hey i mean i'll take 13 grand on 100
grand in two days that's awesome
but i think this has a whole lot more
room to grow specifically because a lot
of these names
are pretty darn sold off from their
highs i'd say somewhere between 20
to 35 percent off their highs on all of
these which means in my opinion
these got a long potential way to go now
sure some like charge point may have
been
you know a little a little euphoric
especially with the spe
switchback electric spec and merger
but that's over now that's history now
and so in my opinion an easy way to
invest in chargers
is simply by looking at something like
this you could invest in this kind of
pie just by going to met kevin.com
chargers and you'll be able to invest in
exactly this now i don't manage your
money in this it's just m1 finance it's
just an idea
but this is an easy way in my opinion
for me to get exposure
to chargers and now i did equal weight
all these and i did include tesla in
here because tesla does produce
some of the most as an individual
company
dc superchargers so i want to give some
respect and shout out to tesla as well
i also think ironically out of these the
tesla actually provides a little bit of
stability
because some of these other companies
are a lot smaller or they've been public
less
less long and so ironically even though
tesla's super volatile in the charging
space tesla might actually provide
some stability to this portfolio so

these are the names that i chose
you know we've got blank we got the tpg
in here we got the charge point and so
on in there
so take a peek at that next we've got a
plug
okay plug okay so i've got a little bit
of a history with plug
i made a video back in january about
plug power
and uh people thought uh well let me
just put it this way
some people got a little upset with me
because i said look the stocks had like
75 bucks
i think there's a good chance this could
sell off as soon as institutional
investors flip out of this
and i had some concerns about the
valuation in fact here's a quick
throwback to the clip
maybe it makes sense to trade this stock
now whether
you want to swing trade it or kind of
social trade it
uh it is very possible that there could
be a large rotation
out of this stock at some point in the
near term and by near term i mean over
the next
year uh which if if you are
planning on buying and holding this
company you you potentially want to be
prepared for like a quantum scape kind
of style slap
where we get this insane run up and then
we get this insane drop
off but in terms of valuation right now
it's very very it's got a lot of hope
built into it
and i am slightly concerned that that
hope you know trading at
322 times 2024 estimated earnings
that's uh that's a little pricey right
now well since i recorded
that video plug power is down over 55
uh since i filmed that video now that's
not to say that plug is a bad stock
i still think it sells for a relatively
rich multiple
and the arguments i made in that video
are still true so if you're really
interested in plug i highly encourage
you check out that video

but there's something that joe biden
said that's very very impactful
joe biden said he wants to lead
the america's future for sustainable
energy
towards electrifying vehicles and using
hydrogen
and the fact that he said hydrogen in
his 15-year plan
is pretty impressive that we were not
expecting him to drop the h-bomb
and he did he dropped the h-bomb so the
neat thing about this
is stocks like fuel cell and plug
immediately reacted and both of them ran
up about two to three percent in the
after hours
not like a massive increase but they
both reacted to joe biden
suggesting hydrogen that's because
obviously they both work with hydrogen
related products
however i just want to give you a quick
bottom line before mentioning that
obviously
you should go check out the plug power
video i did in detail
where i talked about the renault
partnership the french partnership with
plug power
how plug power might be able to
transition from the hydrogen
forklifts and their business model now
to a future of electrifying trucks
with hydrogen watch that but i'm going
to give you a bottom line here
i do as much as i like plug and fuel
cell is maybe like
social plays that is maybe a lot of
people will buy these if we get more
talk about hydrogen infrastructure
i think long run they do still have rich
valuations for what they are
because the tech is just a little too
early don't get me wrong i love hydrogen
and i think these companies are going to
be very well positioned when that
hydrogen future comes
i'm just concerned that hydrogen is
really going to be a 2030
to 2035 play which means i'd rather
pick these things up next time we have a
crash around like
2027 2028 or something like that

but these have moved on joe biden
dropping the h-bomb
another one that's pretty interesting is
i-d-e-x
so id-e-x is one that i'm just
really starting to learn about and i
personally hate looking at investor
presentations because i feel like
they're full of
marketing and a bunch of bs but i did
pull up this investor presentation just
to give me a brief idea of what the heck
ideconomics actually does and they do a
lot of stuff
not only do they acquire a company that
helps them
basically do wireless charging for
vehicles here look at this
wave the only wireless charging true or
only wireless charging truly addresses
the market opportunity for autonomous
vehicles i mean in some sense they're
not wrong about that right
like if the cars are anonymous what are
you gonna have like a robotic arm that
comes out and plugs your car in
that by the way has actually been tested
so far and the answer might be
yes maybe maybe but i could see that
inductive charging kind of like putting
a toothbrush
on a charger or your phone on a on a
charging pad
super simple bus could just drive over a
charging pad park there for a little bit
and keep going
makes sense they've got uh looks like
they're getting into
all electric tractors or some people
call this the john deere
of electricity electric mopeds
they've got cost-efficient new energy
commercial vehicles including
let me not block this over here uh the
development
of a new line of zero emission heavy
trucks and buses
folks remember what joe biden talks
about he talks about electrifying
transit
electrifying buses and even school buses
which we've got another play for school
buses which we'll talk about in a moment
but idex is going to be one that you're

going to want to pay attention to
now i in in this video i'm going to be
very transparent about what i've
invested in what i have not
you saw the charger pie that i've
invested in i do not have money in plug
fuel cell or idx
uh but in the future i could be open to
investing in these and obviously if
you're a course member
uh which this evening and this is why
i'm drinking coffee at 8 pm at night in
california time i'm pulling an
all-nighter because i'm
increasing the price of the courses i
said that i would do this last week but
the thought of spending three hours
changing digits on a screen was a little
a little intimidating me so i've been a
little bit of a bum about that sorry
about that but i will be changing the
pricing tonight which does mean you can
still use that coupon code tonight if
you wanted to
before that pricing changes but anywho
focus here kevin
focus the next stock uh is quantum scape
so quantum scape is a battery a solid
state a battery
a manufacturer i don't really want to
call manufacturing yet
they're really a lab so think of the
company quantum scape as a lab
that's designing and engineering and
researching solid state batteries
solid state batteries are going to be
huge not only for cars
lighter weight batteries significantly
lighter weight batteries batteries that
could charge faster
go longer have longer life spans as well
but the solid state batteries are also
going to be huge for air transport think
eevee tolls
yeah i mean like imagine having your
coffee hopping in a drone
and getting flown around you know for a
few hours and maybe going california to
you
to new york on an ev toll uh which i
don't know if we'll ever go that far but
if anything's going to make it happen
folks it'd be something solid state
and just saying solid state in the world

of batteries by the way
that's better than hot coffee at 8 pm at
night like
that is a such a buzzword in fact neo
the the share price of neo skyrocketed
just because when they had their neo day
they talked about the potential for a
pseudo
solid state battery it was like a part
solid state battery
but just because everybody heard solid
state battery
the share price like shot up and so when
people hear oh hundreds of billions of
dollars
are going to go from biden's plan into
research and development for battery
manufacturing
uh people get excited about quantum
scape which is one of the
the largest pure electric plays right
now i'm sorry pure battery plays right
now
okay next then we also need components
to go into batteries
and this is where companies like mp
materials
have gotten a lot of attention and mp
materials all
i have to say they absolutely crushed
their last earnings
destroyed their last earnings we covered
their last earnings alive and they were
so
good i'm still blown away by when i was
looking at their income statement
i'm like oh my gosh how are these
numbers possible it was so so
impressive now unfortunately after that
the stock was green but then the next
four or five days thereafter
aka the last week here the stock has
kind of been selling off
and that could create an opportunity to
get into something like an mp materials
a lot cheaper so mp materials
is a potential supplier for components
like lithium could be place to pay
attention to
so definitely pay attention to uh you
know
something like an mp materials next
let's talk about this one that i think
is going to be a little bit

under the radar okay so one that i think
might be a little under the radar here
is pallent here now you might be
wondering wait wait wait what pallet
here
yeah pound here and there's a there's a
special reason for this in fact i'm
going to pull it up here on the
infrastructure plan because
i i was a little shocked by this so what
i'm going to do is i'm going to pull up
the
the the actual spreadsheet or flow chart
that we did here
and you can read this section here and
then i want you to think about that for
a moment look at this right here
okay so and shout out by the way to a
course member for connecting the dot on
this one
what i'm about to reveal uh thank you
well first of all to all of those of you
in the stocks and psychology money group
who
post your ideas and your connections so
fun to talk with you in there i try to
chat in there every single day so it's
super fun to talk
but anyway take a look at this so here
it says 50 billion dollars
for department of commerce to create a
new office
to monitor domestic industrial capacity
okay so now you have to ask yourself do
you think that means
joe biden's going to have an office of
people going
back to work today hey uh mp materials
how many
buckets of lithium you all mine today oh
that many okay
i don't think we're gonna be looking at
manual tracking
for all of this industrial capacity
what i expect is a possible or a
possibility
is that manufacturers might be asked by
the government to provide
data on how many months of supply they
have for certain things and their supply
chains or materials or whatever
to to so that the government can kind of
keep an eye on okay like are we gonna
have a shortage do we have any issues

are we seeing any patterns
and it's actually a win-win situation
because if the government can say hey yo
ford
looks like we might have a chip shortage
coming up in the next two months
businesses can better prepare and that's
actually a way of making the country
more competitive
but businesses like it's not like toyota
is going to want to give that data to
ford
uh and this is a way that maybe the
united states government can try to
aggregate u.s manufacturing
data and make conclusions to actually
give back to manufacturers
i mean in theory that is the role of
government how well they execute
i don't know but that is in theory the
role of government the benefit of
everyone right
ideally but anyway take a look at this
folks
look at this what is this folks palin
frickin tear what does this say this is
nuts
manufacturing the most critical
challenges facing manufacturers
throughout the value chain are
fundamentally
data challenges supply chain procurement
quality control efficiency rapid
troubleshooting and demand
forecasting that basically depend on
accurate and up-to-date data landscape
well where do you think you can get this
up-to-date data from and who might be
able to compile all this
well how about the biggest company in
the united states that
already uses palantir the government
the government like literally
this page right here defines what could
be the
perfect solution for the government's
new office on exactly that
look at this a point-and-click
analytical environment where users can
monitor for and respond to disruptions
on the production line i mean this is
obviously more micro scale to an actual
factory
but imagine if you can monitor all

supply chains throughout the country
right
this uh this is pretty powerful and i
would not be shocked
if uh the government could be involved
in this and pound here now that's a
stretch
it's speculation you have to make your
own conclusions on all of these as usual
if you lose money and you paper hand and
you sell out
and you realize your losses it's your
fault not mine okay
next folks end phase end phase
end phase oh my gosh other than tesla
which obviously i think in this we
should just
give the quick honorable mention here to
tesla i made a video earlier about
the the tesla etf and folks
i believe it okay tesla is kind of like
an etf i mean remember
they do charging they do batteries they
do car insurance commercial vehicles
residential vehicles
solar panels inverters solar roofs
bitcoin mega packs for grids automation
robo taxis
like tesla is like the daw in this list
right where
i make standalone videos on tesla all
the freaking time i'm not going to go
into deep on tesla here but obviously i
have to mention tesla but aside from
mentioning tesla
end phase do not blind yourself to the
real potential of end phase
i was talking with some local solar
installers
just recently here within the last week
and folks
people who don't use tesla uh enfaze is
like the number one contender and end
phase users and installers
they're like end phase quality blows
tesla out of the water now i know anyone
who invests in tesla's gonna be like
nothing blows tesla out of the water uh
uh you know what so
my test i get it obviously tesla is my
biggest position it's like fifty percent
of my portfolio
but end phase is is a big chunk it's
like five to six percent of my portfolio

and
that's ordinarily a big piece of a
portfolio
so enphase makes very very high quality
they don't make solar panels but they
make very very high quality
micro inverters that can individually
monitor and control solar panels
really important especially if there's
like partial shading in areas
like on a house from a tree or whatever
you don't lose production from
from the rest of the line but also uh
home battery packs which is something
that
uh Biden wants to wants to research and
study and see more of
a Biden in one of the last stimulus
packages was
instrumental in actually including a
section
that allocated a bunch of money for the
government
to study vehicle to grid and grid to
house
charging and sort of like these battery
storage systems where you could use
the battery from your car or the battery
from for like a whole house battery
to help actually support uh potential
stress on a grid to prevent what
happened in Texas
so missing out on some of these battery
plays
I think is a mistake an end phase if
it's not Tesla
or maybe it's Tesla and end phase end
phase gotta be on your radar
and they're super high margins super
high quality products
definitely a company that's growing like
a weed as well
so don't ignore Enphase really good one
okay then we've got
uh NGA is the ticker symbol but that is
actually a spec
which uh spikes have sold off a lot
lately I think NGA is going to run right
back
to 20 and beyond I think it's highly
oversold right now
it tends to rubber band up to twenty
dollars
uh NGA is uh a

um an electric commercial vehicle
manufacturer
but they're their advertising at least
is very well known
for this something that biden has
specifically talked about
i pulled up the share price here it's at
16 15 after hours
electric school buses now we don't know
if we
actually see these things come joe biden
has talked about electrifying school
buses and electrifying buses
we would love to see that happen
obviously in the ev community
but uh we'll see if it actually ends up
happening that's the big thing
but line electric is one you want to pay
attention to what's this i haven't
actually seen this yet
lion electric scores its largest eeevee
truck order to date
lion 100 lion 6 and line 8 trucks to be
delivered in 2021 2022 for
pride group enterprises who's that pride
group enterprises
100 electric trucks that's really good
as we recall previously the company
announced a deal for 50 trucks for a
canadian national railway
and 60 electric school buses very good
precedent there right
already but who is this canada and us
it seems like canada is really trying to
kick our butt with the electric vehicles
uh but uh take a peek here according to
the line election offer includes tractor
semi okay got it
so to date lion electric has delivered
more than 300 electric vehicles
in north america and its manufacturing
facility in canada
has at the capacity to produce
approximately 2500 vehicles per
year soon the company intends to also
build its own battery pack manufacturing
plant
in quebec and that's great now
i would love to see okay so this is oh
okay pride enterprises
so it looks like they lease
and sell trucks uh let's see
how pride group is changing their
trucking

industry's reputation pride enterprise
group the trucking conglomerate recently
moved to establish a dealership so they
sell
trucks and they're buying a hundred
electric vehicles from lion electric
to be able to resell them as part of
their dealership network that's what i'm
understanding here
now i don't own any lion electric yet
truck sales leasing and financing
equipment
rentals logistical service so it seems
like you might be able to even rent
trucks from them pre-owned truck sales
tractor sales
okay yeah i do not own shares of line
electric yet
so some of this is new to me but i just
want to make it i want to tell you about
it first i love everybody who follows
the channel here
but i'm very interested in
in line electric as is one that i'm
paying attention to
specifically because of the Biden
administration
i'm sure many people are but uh this is
what we want to pay attention to so
we've got
this is sort of the pre-order or the not
pre-order the order we saw from pride
group
then we do have these buses and then we
do
also have uh city buses
as as at least a proposed bus
it'd be so cool to talk to line if
somebody has a connection with lion
electric and we can like talk to the CEO
or something
that'd be freaking amazing if somebody's
got that connection hit me up let's set
that up
all right next one so yeah
okay let me talk about this one in a
moment because it
this one the last one makes me a little
sad so i'm going to move up we're going
to talk about a different one first
all right the next one that we're going
to talk about is this cup of coffee here
no
it's 8 19. i had to take a sip of the

coffee
all right so voyager digital
voyager digital has nothing to do with
the electrification of america
it is a cryptocurrency uh broker
essentially
you can go to actually metkevin.com
voyager i'm an affiliate with them
uh which means if you sign up there
you'll get 25 for free and they send me
a thank you as well
but they pay you interest on your
cryptocurrency so why am i talking about
voyager digital the stock
as part of this uh conte
a potential stock set to consider
well voyager digital currently 26 bucks
ran up from 15 since my interview with
the ceo
of voyager whom by the way i've
interviewed twice
and you can see those interviews on the
channel here voyager digital benefits
from
volatility in cryptocurrency prices and
they also pay you a good amount of
interest on your cryptocurrency
there's obviously a risk with that
anytime you're getting paid interest on
something you want to evaluate your risk
but voyager digital is interesting
because with a massive package like this
a lot of folks believe there is going to
be a lot of volatility in the pricing of
things like bitcoin
volatility and cryptocurrency pricing
equals profits
for companies like voyager voyager
doesn't really care i mean i'm sure they
do
in some sense don't get me wrong i don't
want nobody wants to see me to get hurt
but i think they're a little agnostic to
price
so if the price of bitcoin is 60 000 90
000 or 30
000 it doesn't matter as much as people
buying and selling it and that's where
voyager is making a ton of money
they're killing it their revenues are
going through the freaking
roof uh and i've got about 300k in this
company
so uh you know i'm just putting putting

all my you know by
potential biases on the table here
obviously there are risk factors there's
a lot of competition for a company like
voyager
i've been wanting to make a stand-alone
video for this company i really
maybe this weekend we'll do standalone
videos for a lot of these companies
we do have a three-day weekend coming up
but this is one to pay attention to as
well
okay now what about one to maybe not pay
attention to as much so i hate saying
this because i feel bad
but um look first of all the all the
electric vehicle space are probably
going to rise
with the tide but i i'm just concerned
about workhorse
i'm concerned about workhorse because
the biden administration really screwed
them
and gave their usps like electrifying
the usps fleet contract
to oshkosh which is saying they're going
to do
some electric cars and the rest are
going to be gas cars for the usps
or maybe they'll hybrid them i was
really disappointed by that
i really hope that gets fixed and it
doesn't have to i mean it'd be cool if
it went back to workhorse i don't think
it will
uh usually it's very very sticky like
once once a contract is
inked getting that reversed good luck it
ain't happening it also sets up a bad
precedent for the country to kind of
like revoke a contract and give it to
somebody else
after they make a deal so it's probably
not going to happen
but uh so i wouldn't be hanging my hat
on on workhorse for a potential reversal
there
but uh i i would be interested in um
well actually no i was gonna say i might
be interested in like oshkosh but no
i mean maybe do your own research on
what you think of oshkosh
and uh workhorse both of them i'm just a
little bit worried about a little bit

concerned about
and honestly this whole thing with biden
kind of pulling the rug from workhorse
whether it was his
staff or administration or him directly
i have no idea it doesn't matter
it was under like the buck stops with
him right he's the boss he says we want
to electrify
the postal service the people working
for them didn't do that
that does also make me a little bit
concerned for
let's be real plays like lion electric
do we think that
school buses are actually going
electrifying or is this just a
you know cool idea are we actually going
to see hydrogen or did uh
did biden just talk about something that
might be a reality in 15 years but is
nowhere close to even happening
so there are some major risk factors to
consider in all of these
and out of all of them that i mentioned
here i invest
in enfase palantir tesla voyager digital
and the charging pi probably my next
place that i consider putting some money
into
maybe maybe okay this is a big maybe
would be things like line electric
idex quantum is a little too early for
me
hydrogen's a little too early for me but
maybe even
oh that's disappointing uh we'll go to a
different camera then
maybe even lion electric maybe
we'll see but this uh and honestly
actually even maybe mp materials because
they've sold off quite a bit as well
so this just kind of gives you a more
free-flowing discussion around my
thoughts on
stocks to play for the biden
infrastructure package if you found this
helpful consider checking out the
programs linked down below i always
appreciate you watching these videos and
folks
we'll see in the next video
you