

so there's a certain 12 stock that kathy wood has been directing ark to buy very quietly over the last couple of weeks her last purchase of this mysterious stock was just yesterday on march 11th but she also bought it on march 10th on march 9th on march 8th march 3rd march 2nd march 1st february 26th and as early as february 24th so basically this is a stock that she was buying throughout the entire downtrend of the ark funds and once she kept buying as they started bouncing during a time period where she said she's going to be focusing on her highest conviction plays and forgetting about the rest so clearly this is a high conviction play for kathy wood so charlie stop beating around the bush what is this elusive play well it's ticker symbol a1 an s pack that's going to be taking mark forged public markforged is a 3d printing company as you know 3d printing stocks have been garnering quite a lot of attention over the last year and while most of us have a pretty basic idea of what 3d printing is sometimes it's still very hard to actually comprehend how big of a deal 3d printing is for the manufacturing industry 3d printers like the ones offered by mark forged threaten to disrupt the entire manufacturing industry with traditional manufacturing you have many limitations you have to deal with extremely limited and costly design flexibility you're forced to hire a ton of expensive specialists that are often in short supply and you're screwed if there's a supply chain disruption like cough a pandemic not that those ever happen you waste a shy ton of money on unnecessary expenditures and it slows down the overall process because prototyping and adjusting products take a lot longer you have to rely on different supply chains to build it and send it to you you have

to rely on different specialists you
have to get special machines
that are built for that specific
prototype oftentimes however mark
forge is offering a solution to this
with flexible more affordable machines
that allow companies to design
program and manufacture across a myriad
of industries and i know folks we've
covered other 3d printing stocks before
like nano dimension and the likes of
that but just for those who haven't
heard it
the 3d printing segment is huge it's not
like this up in the sky
pi sector that's like well it could
happen in 20 30 40 50 years
but right now i don't know it's too
early just between 2012
and 2020. you've already seen rapid
acceleration of addressable market
opportunity and it's expected to have an
even more rapid acceleration of
addressable market opportunity in the
years to come
this is likely going to be a market
where you have a few winners and those
winners take all and leave all
of the other ones in the dust so if you
can find some of the winners early on
you can get your check written out for
you and so in this video i'm going to be
talking to you about what i think sets
mark forged apart and makes it a clear
winner and at the end of the video we're
going to be circling back and doing some
recaps on some of our plays for today
and closing out the week and the only
thing that i ask for all of this is that
you hit that ravishing like button and
also don't forget to subscribe okay so
to start what exactly does markforged
offer charlie well they offer a platform
that controls the 3d printer they offer
the 3d printer and then they offer
materials that
are basically ink for the printer on the
platform side this is where you actually
design the specifications of what you
want printed
and you could also choose from templates
already loaded into the platform the
ease of use and flexibility of a
platform is very very important because

again we don't want
to have to have extremely highly trained
specialists manning this that's
expensive
those are rare and that creates a huge
issue that
3d printers are trying to solve it also
needs to work across a lot of different
industries and again be able to be
operated by the people in those
industries but the beauty of offering a
platform
like this is that they can do
over-the-air updates that means the
features efficiency and reliability of
these printers actually get better over
time because they get updated over time
so
instead of having to make a huge
investment in a whole new product well
these printers get better on their own
then you have the machine itself mark
forged
offers a wide variety of printers
specified for different types of
printing
most of the major manufacturing
materials can be handled with their
printers now of course 3d printers don't
just print stuff out of thin air
you all best be betting you need some
ink and 3d printing ink is in the form
of raw materials
and the need for materials ensures that
marked forge has ongoing customer
revenue because once their companies buy
their machines although i need to be
paying for a steady supply of ink as
well
ink okay charlie but wait a second i
don't really understand
manufacturing i'm not an expert in
manufacturing you could tell me this
prints fairy dust and i wouldn't be able
to refute that
so how do i know this is actually useful
charlie well proof of concept in terms
of who they're working with if you're
looking at who's actually using it mark
forged has clientele across
many industries working with the likes
of bosch airbus
general electric lockheed martin
multiple u.s defense institutions

nasa spacex bayer gillette regeneron
porsche tesla honda volkswagen just to
name a few in terms of a total number
their printers are in an estimated 10
000 facilities today and they have plans
to be in a hundred thousand in five
years 10x the current number that's a
pretty damn bold goal and they have a
very interesting model in terms of
improving their product
because the more printers that are out
there and the more clients they have
buying and using these printers
the more data goes and gets sent out to
their cloud and the more data the cloud
has the smarter the whole system is and
that sends it back to the printer
so as more printers are in the network
and more people are using the printers
the smarter each printer will become and
the smarter that artificial brain in the
sky gets and the more competitive their
product gets and that means you have an
ever evolving performance boost that
gives more and more capabilities
maybe eventually these will be smart
enough to manufacture humans
maybe they already have arc likes to
invest in companies that they think are
in winner take all industries and
sectors and the reason 3d printing is
one of those industries is because
once you've created that ever evolving
structure of clients you've already had
a huge performance boost and because
this improvement model is based on how
many printers they have
that means that it's going to get
smarter over time which means that any
new entrant to the market
is going to have a hard time catching up
to all these other ones that already
have all of this experience and already
have all of this complexity built into
their
ai but anyways on their youtube channel
they have a lot of videos showing how
their machines are used and you can
check that out you just look up marked
forged
i'll put a link in the description below
but one of the most relevant demands
right now are for chips and i'll show
you the video on how

they manufacture a crucial component in chips
so needless to say very very intriguing technology it's also especially important to mention after watching this that not all 3d printing companies are printing the same thing
ironically enough nano dimension another one of our plays is for example much more closely aligned with helping solve chip shortages as they are in the business of printing complex electronics whereas mark forge works with more general materials and prints parts on demand for manufacturing needs
eventually i do think you may see a lot of these cross over but
right now that's not the case okay
lastly it's worth talking about how s packs work because this is in the s-pac stage
so when you buy a1 you're basically investing in a fund
that will eventually become a stake in mark forged
which for now is a private company with a1 we have the first opportunity to take a public stake and mark forged and we've seen arc take advantage of that as well but the team leading a1's merger is notable themselves they were early investors in paypal truea palantir airbnb pinterest square uber open door reddit and carta many of these companies are power players that we've talked about in other videos
that's the team that will be leading the mark forged merger now whatever you do do not tell any of our zip trader eu members that i'm going to leak another price target
but i put a price target of 18 on this one post merger i think it's very likely that we end up upgrading this one
but because it's in the pre-s pack stage i want to put it at this level before the merger is actually completed right now with rising interest rates we're in a little bit more of a constrained environment for s-packs however even if you're going to hold it past the merger it's trading pretty damn low we're trading right at the s pac floor so but overall long term i think that 18

is definitely definitely under killing
it okay quick recap on the day
so pretty slow day overall this morning
in the pre-market we said futures were
fairly flat with the nasdaq down yada
yada
as investors worry a bit about bond
yields that picked up again today
nothing too shocking there we are going
to continue to see different spikes of
interest rates as we leave the pandemic
by nature of the fact that more money is
going to be circulating in this economy
however it should eventually stabilize
out to those 2019 levels
before the pandemic even started and the
fed has basically said that that's what
they want to happen which at those
levels that's not going to be a disaster
for growth stocks the recovery plays were
also leading this morning our ba play
had another 6
rally which is pretty nice and ccl three
percent and
not too shabby recovery plays aren't
going to be as fun and as exciting as
growth stocks but they are useful to be
a little bit more diverse with your
trading
our growth place today and but overall
this week was pretty good for growth
play so no complaints there um our
short-term plays
e-n-t-x we briefed on this mama jama
yesterday and even reflected on it in
yesterday's video too we again today
reiterated it but it ran
up to 10 16. that's funny because in
yesterday's video we were talking about
how i was disappointed i thought this
had more steam left
i thought this was a damn big catalyst
why is this not running up even more
and i was right yesterday it's just that
i was wrong on the time frame turned out
that steam was let off this morning
and we saw it run up to here again
though it's a little bit misleading when
you see these big runs
and you're not going to be catching all
of that because we have risk management
that makes it so that hey
you can manage your risk in these plays
but it also limits your upside

do you have a trailing stop loss you
have validation but still undeniable
lots of opportunities with catalyst
plays
seal was another interesting one that we
briefed on in the pre-market a popular
analyst gave it an upgrade to a whooping
whopping 14
with seal trading at under three dollars
yesterday that's a lot of damn upside to
14
and people rallied this guy up to 589
today which is pretty crazy
this is basically just on an analyst
upgrade that people like oh an analyst
thinks this is really high so they
rallied it up to 5.89 but pretty good if
you could kind of scalp off the sheep
and that's why we briefed on a lot of
these places anyways folks if you have
any ticker that you'd like me to discuss
in the next video go ahead and comment
below
if you'd like to learn how to trade
would like access to our private chat
and daily morning briefings we'll go
ahead and check out ziptraderu in the
comment section below or in the
description below i have a link if you'd
like two free stocks and you're
wondering what broker to trade these
stocks on well
weeble is a fantastic broker and i'll
put a link to them below
and as always have a great day and i'll
see you in the next video