



MAKING THE WORLD SMARTER, HAPPIER, AND RICHER

THE 2021 5G RENAISSANCE

Special report by Michael Douglass

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With the election and global pandemic dominating headlines this past year, a small group of smart investors have begun quietly putting money behind what I believe could easily be 2021's biggest trend — 5G's rapid expansion. Big names like AT&T, Verizon, and T-Mobile are investing billions to rapidly build up their infrastructure, meaning that I believe 2021 will be the year that 5G's opportunity comes fully into focus for Wall Street and the broader public.

And what an opportunity it is!

Consider:

- **Potential 18* growth in 5G sales by the end of this year**
- **Projected 60* growth by 2023**
- **\$17 trillion estimated total market through the next decade**

Now, those are impressive numbers to be sure — but the real question is: What could such torrential growth do for investors' portfolios?

If past is prelude, well ... **a lot.**

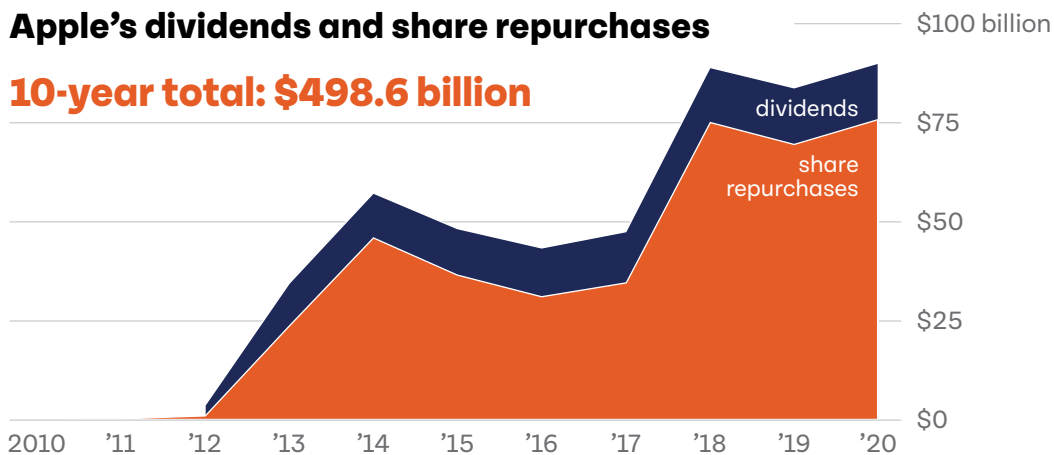
Consider: Over the past 13 years, Apple has transformed into a mega-cap powerhouse based primarily on a simple concept:

Build the newest, coolest, incredibly expensive smartphones ... **every year.**

The combination of pricing power (the iPhone 12 Pro starts at \$999 and the Pro Max at \$1,099!) and rapid upgrade cycles means Apple can drive repetitive, predictable revenue that has fueled a massive bottom line, enormous reinvestment in the business, and almost \$500 billion in dividends and share repurchases in the last decade!

Apple's dividends and share repurchases

10-year total: \$498.6 billion



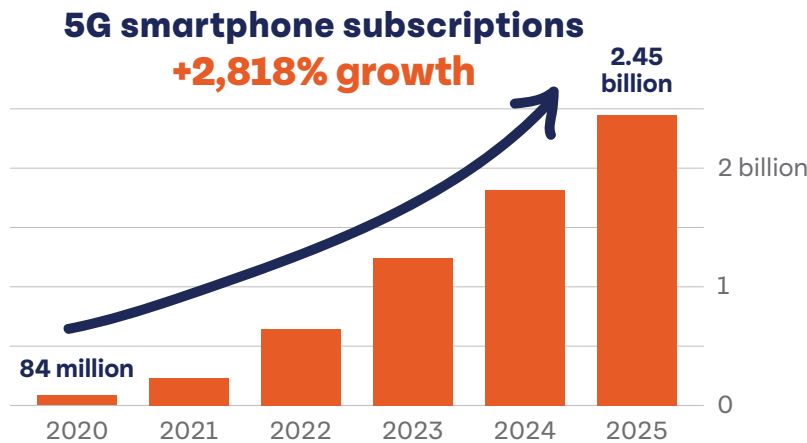
And given that background, it should be no surprise that Apple's CFO unambiguously declared:

"5G is a once-in-a-decade opportunity" for Apple

Apple CFO
Luca Maestri



Consider the massive growth in the 5G phone market predicted over the next five years:



November 2019 forecast by Ericsson Mobility Report

Those new phones have to come from somewhere — and I bet Apple will be able to snap up a huge slice of that pie, leading to uncounted billions of dollars in opportunity for the tech giant as it enters, to quote CEO Tim Cook, “a new era” — **the 5G era.**

BUT 5G IS SO MUCH BIGGER THAN APPLE

Although smartphones are an easy way to understand just how quickly 5G could ramp up in the very near future, they wildly understate just how **transformative** 5G truly could be. Consider just a few estimates:

- **\$1.2 trillion reduction in global health costs.** Intel estimates that 5G can potentially achieve these cost savings by connecting underserved communities to more (remote) specialists, speeding up algorithmic support for doctor decision-making, and more.
- **Supporting over 22 million jobs.** Just think what a huge impact this level of construction and investment will make in fields like construction, engineering, and technology as 5G drives innovation in artificial intelligence, the Internet of Things, connected cities, and more.
- **\$2.7 trillion in infrastructure upgrades.** Because 5G signal doesn't travel as far as the current 4G/LTE standard, telecoms will invest an estimated \$2.7 trillion into new and upgraded infrastructure. And they've eagerly begun, with AT&T, Verizon, and T-Mobile in a fierce competition to get 5G out to as many Americans as possible. They know the advantages of being the first mover in this space ... and the costs of being last.
- **And so much more.** After all, with a \$17 trillion potential opportunity ahead of us, this report can only scratch the very surface of all the opportunity we could see.

IDENTIFYING THE BIGGEST POTENTIAL 5G WINNERS

Now, with a \$17 trillion opportunity ahead of us, it's fair to think that there could be many winners. And I certainly think well-known companies like Apple will be among them!

In fact, I believe that no 5G portfolio is complete without Apple — and The Motley Fool's is no exception!

But here's the thing —

As by far the largest publicly-traded U.S. company with a \$2 trillion+ market cap, Apple's future upside is probably somewhat limited ...

Fortunately, The Motley Fool has built an “all-in-one” portfolio of what our team believes to be the very best 5G opportunities — *Extreme Opportunities: Next-Gen Supercycle*.

And, true to The Motley Fool's history of identifying under-the-radar stocks that can drive simply **titanic** opportunities — our *Next-Gen Supercycle* portfolio includes several companies that are less than $\frac{1}{100}$ the size of Apple.

Here are just a couple of examples from the 23-stock portfolio the *Next-Gen* team has put together:

- A little-known company that is the leader in an under-appreciated niche that could soon represent more than 50% of 5G Internet of Things connections ... with a \$2.7 billion market cap, it has **almost incalculable** potential growth ahead ...
- Another small-cap stock that has captured **just 2.6%** of its potential market — and is firing on all cylinders. Rare is the company that gets better as it gets bigger, but this company has (to quote the *Next-Gen Supercycle* team's research report on it) shown “continual improvement in virtually every metric” over the past few years.

In fact, the median company recommended in *Extreme Opportunities: Next-Gen Supercycle* is less than $\frac{1}{25}$ the size of Apple — which translates to long growth ramps and lots of opportunity if 5G lives into its titanic potential.

Particularly as we ramp to potential 18× growth in 5G sales **just this year** (and 60× growth by 2023)!

Michael Douglass owns shares of Apple. The Motley Fool owns shares of Apple.



THIS CYBER MONDAY, INVEST IN THE FUTURE OF 5G

This Monday, we'll be offering the lowest price ever in The Motley Fool's history to **Extreme Opportunities: Next-Gen Supercycle**. This ready-made portfolio and "all-in-one" 5G investing solution represents the highest-conviction stocks that some of our best and brightest minds have found.

And if you're looking to capitalize on this incredible trend opportunity in 2021, then I urge you take full advantage of our best-ever pricing, which will only be available on Monday. We'll open up the sale at around 9:30 a.m. EST, and you'll receive an email from us shortly thereafter.

Accessing this report guarantees that you'll be among the very first to hear about our Cyber Monday sale, so stay tuned Monday morning!