



May 2025



The AI-Infused Paradigm Shift

"We are playing with the hottest thing since the discovery of fire."

- Peggy Noonan

WSJ Columnist and former speechwriter to President Ronald Reagan

The Paradigm Shift Ingredients

Communication

Energy

Means of Production

Transportation



Communication

The Internet + Satellite Broadband

Energy

Nuclear + Battery Technology

Means of Production

Humanoids + Robotics + Automation

Transportation

Robotaxis + Advanced Air Mobility +
Space

Communication Stocks To Watch

Ticker	Company Name	Market Cap (B)	Price vs. 52W High	Theme
RBLX	Roblox	52.24	-0.28%	Gaming
DUOL	Duolingo Inc	24.16	-1.01%	Language Learning
PLTR	Palantir Technologies	302.30	-1.91%	AI Infrastrucutre
NFLX	Netflix	484.49	-2.20%	Video
CRWD	Crowdstrike	109.64	-3.35%	Cybersecurity
MSFT	Microsoft	3,338.25	-4.10%	Enterprise
SPOT	Spotify	126.93	-6.55%	Audio
AVGO	Broadcom	1,092.83	-7.72%	Semiconductors
FTNT	Fortinet	80.41	-8.51%	Cybersecurity
META	Meta	1,649.47	-11.45%	Web
NVDA	NVIDIA	3,170.29	-15.15%	Semiconductors
GOOG	Alphabet	1,942.05	-22.91%	Web
IRDM	Iridium Communications	2.78	-28.42%	Satellite Telecom
ASTS	AST SpaceMobile	8.70	-32.05%	Satellite Telecom
SATS	EchoStar	5.68	-39.10%	Satellite Telecom
RDDT	Reddit	29.24	-51.03%	Web

Energy Stocks To Watch

Ticker	Company Name	Market Cap (B)	Price vs. 52W High	Theme
RYCEY	Rolls-Royce	67.55	-1.65%	Nuclear
GEV	GE Vernova	118.27	-3.17%	Grid Infrastructure
EOSE	Eos Energy	1.55	-3.68%	Batteries
AEIS	Advanced Energy	4.52	-9.10%	Conversion
NVT	nVent Electric	11.21	-21.34%	Protection
BWXT	BWX Technologies Inc	9.79	-21.36%	Nuclear
SMR	Nuscale Power	6.15	-33.00%	Nuclear
LTBR	Lightbridge	0.24	-33.08%	Nuclear
BE	Bloom Energy	4.45	-35.77%	Clean Energy
NNE	Nano Nuclear	1.01	-43.14%	Nuclear
OKLO	Oklo	4.46	-45.84%	Nuclear
ELPW	eLong Power	0.28	-56.35%	Batteries

Robotics Stocks To Watch

Ticker	Company Name	Market Cap (B)	Price vs. 52W High	Theme
DE	Deere	135.32	-3.20%	Agriculture
ABBNY	ABB	87.92	-6.17%	Automation
ISRG	Intuitive Surgical	202.13	-8.45%	Surgery
FANUY	Fanuc	3,916.97	-12.65%	Precision
AMZN	Amazon.com	2,243.98	-12.84%	Logistics
NVDA	NVIDIA	3,170.29	-15.15%	Hardware
CAT	Caterpillar	165.80	-15.76%	Construction
TSLA	Tesla	1,046.80	-31.62%	Humanoids
PATH	UiPath	7.31	-36.71%	Automation
SYM	Symbotic	15.74	-43.69%	Wearhousing
PRCT	Procept Biorobotics	2.93	-48.91%	Surgery

Transportation Stocks To Watch

Ticker	Company Name	Market Cap (B)	Price vs. 52W High	Theme
UBER	Uber	191.80	-0.49%	Mobility Network
BA	Boeing	153.38	-1.12%	Aerospace + Defense
BYDDY	BYD Company	1,228.24	-5.72%	Self-Driving
DASH	DoorDash	83.82	-8.11%	Food Delivery
ACHR	Archer Aviation	6.13	-10.58%	Flying Cars
KARO	Karooooo	1.38	-11.79%	Mobility Data
CART	Instacart	11.55	-17.08%	Food Delivery
GOOG	Alphabet	1,942.05	-22.91%	Self-Driving
XPEV	Xpeng	142.88	-23.53%	Self-Driving
HSAI	Hesai	2.43	-24.15%	Self-Driving
LMT	Lockheed Martin	107.74	-25.71%	Aerospace + Defense
TSLA	Tesla	1,046.80	-31.62%	Self-Driving
AUR	Aurora Innovation	12.95	-32.03%	Self-Driving
JOBY	Joby Aviation	5.69	-32.93%	Flying Cars
BLDE	Blade	0.28	-33.27%	Air Taxi Network
RKLB	Rocket Lab USA	10.07	-34.52%	Rockets
EH	EHang Holdings	1.38	-35.35%	Flying Cars
LUNR	Intuitive Machines	2.08	-53.39%	Space Exploration
RDW	Redwire	0.88	-57.28%	Space Equipment
RCAT	Red Cat Holdings	0.58	-58.22%	Drones
SERV	Serve Robotics	0.51	-63.45%	Last Mile Delivery

LET THE CHARTS SPEAK





500.00
480.00
430.00
390.00
350.00
334.07
310.00
270.00
240.00
215.00
195.00
177.00



Tesla

\$TSLA

800.00

400.00

334.07

200.00

100.00

50.00

26.00

14.00

6.00

3.00

1.60

0.8000



2013

2015

2017

2019

2021

2023

2025



GODSPEED
INVEST LIKE THE JETSONS



3

BYD

\$BYDDY

215.00

155.00

115.00

102.95

85.00

65.00

50.00

38.00

28.00

20.00

15.00



2021

Jul

2022

Jul

2023

Jul

2024

Jul

2025



▼ 3



NVIDIA

\$NVDA



58.50





3





Palantir Technologies

\$PLTR



350.00

230.00

150.00

128.10

90.00

50.00

30.00

17.50

11.50

7.50

4.50

2.90



3

Meta Platforms

\$META

800.00

720.00

670.00

656.03

630.00

590.00

550.00

520.00

490.00

462.00



Sep

Oct

Nov

Dec

2025

Feb

Mar

Apr

May





Meta Platforms

\$META

1,400.00

1,000.00

700.00
656.03

500.00

380.00

280.00

200.00

150.00

110.00

82.00



2022

Jul

2023

Jul

2024

Jul

2025



3

620.00

540.00

453.04

410.00

350.00

310.00

270.00

240.00

215.00

191.00

Microsoft

\$MSFT

GODSPEED
INVEST LIKE THE JETSONS

17

2023

Jul

2024

Jul

2025





3



220.00
210.00
200.00
190.00
180.00
172.00
167.76
164.00
156.50
148.50
142.50
136.50

Google
\$GOOG





3

Netflix

\$NFLX

USD

1,200.00
1,147.10
1,100.00
1,000.00
920.00
840.00
765.00
705.00
645.00
595.00
545.00



Jul

Aug

Sep

Oct

Nov

Dec

2025

Feb

Mar

Apr

May





3

Duolingo

\$DUOL

700.00

620.00

531.46

460.00

410.00

350.00

310.00

270.00

240.00

212.00



Oct

Nov

Dec

2025

Feb

Mar

Apr

May



▼ 3

Uber

\$UBER





CrowdStrike

\$CRWD



3

Roblox

\$RBLX



110.00

90.00

80.00

77.02

72.00

64.00

56.50

50.50

44.50

39.50

35.50





3

Roblox

\$RBLX



160.00

120.00

90.00

77.02

70.00

55.00

43.00

33.00

27.00

22.00

18.00



Jul 2022 Jul 2023 Jul 2024 Jul 2025



SPACE

AST SpaceMobile

\$ASTS

140.00

80.00

50.00

30.00

26.55

20.00

12.00

8.00

5.00

3.00

2.00

1.30



Jul

2022

Jul

2023

Jul

2024

Jul

2025

3



Rocket Lab USA

\$RKLB



80.00

50.00

34.00

24.00

21.83

16.00

10.00

7.00

5.00

3.50

2.50



2022 Jul 2023 Jul 2024 Jul 2025



3

45.00
33.00
23.00
17.00
11.63
11.00
8.00
6.00
4.50
3.00
2.20



Intuitive Machines

\$LUNR



▼ 3

Intuitive Machines

\$LUNR



195.00
115.00
65.00
40.00
24.00
14.00
11.63
9.00
5.00
3.00
1.80
1.10



Nuclear Energy



3

50.00

38.00

30.50

24.50

21.64

18.50

14.50

11.50

9.00

7.00

5.60

NuScale Power

\$SMR



Sep

Oct

Nov

Dec

2025

Feb

Mar

Apr

May





NuScale Power

\$SMR

70.00

40.00

28.00

21.64

18.00

12.00

8.00

5.00

3.50

2.30

1.60



▼ 3



60.00
45.00
33.00
27.32
23.00
17.00
11.00
8.00
6.00
4.50
3.30
2.40

Nano Nuclear Energy

\$NNE



Jun Jul Aug Sep Oct Nov Dec 2025 Feb Mar Apr May





3

Oklo

\$OKLO



140.00
100.00
70.00
50.00
39.05
34.00
24.00
16.00
11.00
7.00
5.00
3.60



May Jul Sep Nov 2025 Mar May





D

O 10.53 H 10.79 L 10.50 C 10.73 +0.31 (+2.98%)

USD

3

Rolls Royce

\$RYCEY





D

O 10.28 H 10.79 L 10.19 C 10.73 +0.56 (+5.51%)

USD



3

Rolls Royce

\$RYCEY

40.00

24.00

16.00

10.73

6.00

4.00

2.50

1.50

1.0000

0.6000

0.4000



TV

GODSPEED
INVEST LIKE THE JETSONS

2013 2014 2015 2016 2017 2018 2019 2020 2021 2022 2023 2024 2025



Robotics

3

Deere

\$DE



TV

GODSPEED
INVEST LIKE THE JETSONS



ABB

\$ABBNY



FLYING CARS



Archer Aviation

\$ACHR



22.00

18.00

14.00

11.16

9.00

7.00

5.50

4.50

3.50

2.70

2.20

3

Archer Aviation

\$ACHR



TV

GODSPEED
INVEST LIKE THE JETSONS

Jul

2022

Jul

2023

Jul

2024

Jul

2025

J



Archer Aviation / Joby Aviation

\$ACHR / \$JOBY



QUANTUM COMPUTING

3

D-Wave Quantum

\$QBTS



17





3

D-Wave Quantum

\$QBTS

120.00

70.00

40.00

24.00

14.00

11.06

8.00

4.00

2.00

1.20

0.7000

0.4000

17

GODSPEED
INVEST LIKE THE JETSONS

Jul

2023

Jul

2024

Jul

2025



3

80.00

50.00

30.00

17.50

10.63

7.50

5.50

3.00

1.50

0.9000

0.5500

0.3300



Rigetti Computing

\$RGTI



Oct

Nov

Dec

2025

Feb

Mar

Apr

May

3

Rigetti Computing

\$RGTI



17



FOOD DELIVERY

▼ 3

DoorDash

\$DASH

260.00

220.00

197.80

180.00

160.00

145.00

133.00

120.50

110.50



Sep

Oct

Nov

Dec

2025

Feb

Mar

Apr

May





DoorDash

\$DASH



3

Instacart

\$CART



***“When I see a bubble forming I rush in
to buy, adding fuel to the fire.”***