

ESG Investors look to Nano One as a connector in a sustainable future

If you follow Jack Lifton on InvestorIntel you'll have a pretty good idea that the dream of replacing all the internal combustion engines on the road today with battery electric vehicles (BEVs) is more of a fantasy than a reality based on today's technology. The demand for raw materials, in particular lithium, just doesn't add up. Jack does a great job of explaining the math in his Lithium by the numbers article from earlier this month with a follow up to hammer the point home in Lithium: The Haves and the Have Nots from last week. In summary, the first article suggests that even if lithium production doubles by 2025 (which producers say they can do), that will only get the world to roughly 10% of annual car production being BEVs. The latter article states "There is not even the remotest possibility that global lithium (measured as metal) production could grow to this week's prediction, for example, by the child-like prognosticators at Deloitte, that in 2030 32% of all newly manufactured motor vehicles would be battery electric vehicles (BEVs)."

I think it's safe to say that most reasonable people around the world agree that reducing emissions is a positive step for humanity. But how do we think as a global community that we can achieve these goals in light of some pretty serious shortfalls in the basic building blocks to making this happen? Obviously, technology has to be the answer. We have to be more efficient with the resources we've got if we want to have any chance at not only meeting the political goals of carbon reduction but also avoiding the often unwitnessed reality of destroying the earth by mining every possible resource required to achieve those goals.

The good news is that there is already a company out there working on technology to improve lithium-ion batteries. Nano One Materials Corp. (TSX: NANO) is a technology company with a patented and scalable industrial process for the production of low-cost, high-performance cathode powders used in lithium-ion batteries. These unique materials are being designed to add value to electric vehicles and grid storage batteries in the global push for a zero-emission future. Nano One's patented manufacturing technology – the "One Pot Process" – streamlines the production process and thereby reduces cost while enabling higher performance cathode materials as compared to the standard manufacturing process. Last year the Company announced the development of a coated, single crystal cathode material for lithium-ion batteries that provides up to 4 times improvement in longevity. Granted this doesn't necessarily reduce initial demand for lithium but it certainly helps to put less stress on the supply chain going forward.

With that said, last month Nano One announced three new patents issued and allowed in Canada, the US and China. Notably coverage for a novel method for phosphate stabilizing of lithium-ion battery cathodes. An important, low-cost durability improvement to lithium nickel manganese oxide (LNMO) cathode material which delivers energy and power on par with other high-performance cathodes and is more cost-effective because it is cobalt-free, low in nickel and does not require excess lithium. LNMO also has an operating voltage that is 25% higher than commercial high nickel cathodes, enabling fewer cells in applications such as power tools and electric vehicles while providing improved productivity, efficiency, thermal management and power. So no cobalt, less nickel and ultimately less lithium given you don't need as many power cells.

And then there's the other unintended consequence of moving towards a lower carbon future, the supply chain. Currently, the cathode supply chain is long and complex. Nano One

technology enables cathode materials to be manufactured directly from nickel, manganese, and cobalt metal feedstocks in the form of metal powders, metal carbonates and other salts rather than metal sulfates. Metal powders are one-fifth of the weight of metal sulfates, avoiding the added costs, energy, and environmental impact of converting to sulfate and shipping and handling of waste. Nano One's technology aligns it with the sustainability objectives of automotive companies, investment communities and governmental infrastructure initiatives. It also offers an opportunity for metals refiners to provide environmentally, and sustainably mined sources of nickel ore to integrate and manufacture cost-reduced value-added cathode powders for direct supply to battery manufacturers.

In summary, Nano One appears to have the right technology at the right time. On top of that, the Company does it all with a lower overall carbon footprint than many, if not all, of its peers. In my opinion, the latter concept still isn't valued as high as it should be given as most ESG investors appear to be focused on top line carbon impact, and rightfully so given that policymakers haven't really made it an issue yet. In the meantime, as Jack Lifton educates the world that BEVs in every driveway may be a fallacy in our lifetime utilizing current technology, here's a company that could perhaps help make it more of a reality.

**A cleaner greener world is
what Nano One Materials is**

all about

The market sure liked the latest news that Nano One Materials Corp. (TSXV: NNO) received conditional approval to graduate to the Toronto Stock Exchange under a new trading symbol "NANO" as the share price was up an impressive 13% yesterday. Perhaps this reflects market interest of the exciting potential of this interesting cleantech innovator.

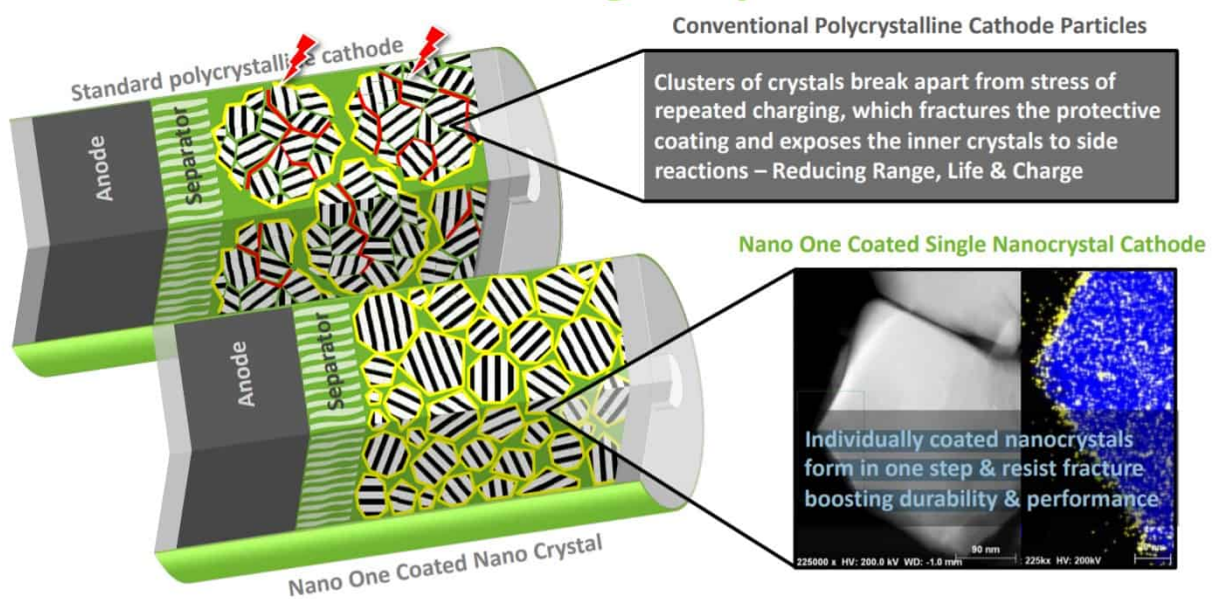
For starters, Nano One is a technology company with a patented process for the low cost production of high performance cathode materials used in lithium ion batteries. You know, the batteries that are going to power virtually every battery electric vehicle and store the power from all the renewable energy sources coming online along with all your portable electronic devices. In other words, a pretty large addressable market. Nano One is in the process of showing the world that they have a better design for coating the cathode of a lithium ion battery.

All lithium ion batteries have cathode materials and it's estimated that the cathode represents roughly 25% of the cost of the overall battery. This is where Nano One has focused on trying to reduce costs and improve efficiency. The Company's silver bullet (that's an expression, I don't think there's any silver involved) is the patented "One Pot Process" which streamlines the production process and thereby reduces cost while enabling higher performance cathode materials versus the standard manufacturing process.

Cost reduction comes from the process being able to go directly from metals (lithium, nickel, cobalt and manganese) to cathode powder without having to convert it to sulphate or in lithium's case, a hydroxide. This results in reduced costs for raw materials and energy input which in turn makes for a greener, lower carbon footprint overall. Cost savings can be several thousands of dollars per ton for cathode material.

The One Pot Process also helps on the performance side. As a battery charges and discharges, conventional polycrystalline cathode particles start to break apart from the stress of repeated charging. Over time this can fracture the protective coating and expose the inner part of the crystals to side reactions. This has the effect of reducing the range, life and charge of a battery. The Nano One process individually coats nanocrystals which form in one step and resist fracturing thus boosting durability and in turn full life cycle performance.

Nano One – Coated Single Crystal Ni Rich NMC



www.nanoone.ca

Source: Nano One Materials Corporate Presentation

The technology has been proven to work on several occasions including a joint development program focused on LNMO cathode materials (lithium nickel manganese oxide) that was successfully completed with validation by a multi-billion-dollar Asian cathode material producer and in collaboration with the University of Michigan on the development of innovative solid-state battery technology, to highlight the most recent updates. As well the Company is involved in strategic partnerships with Volkswagen, an undisclosed large US auto producer, Pulead Technology Industry (a highly respected Chinese cathode producer) and Saint Gobain (a 400-

year-old materials company). In February Nano One announced its M2CAM (metal to cathode active material) initiative to engage in discussions with large integrated miners to reduce environmental footprints and maximize upstream value in the global battery supply chain.

As you can see, this company ticks all the boxes for a greener, cleaner world. And the best part is, they have more than enough cash to continue ongoing research and development, pilot plant expansion, business development and strategic initiatives having raised \$29 million at the start of April to go along with the \$30 million of working capital they finished Q1/21 with. Nano One appears to have the right solution at the right time and if the new green economy is serious about reducing its carbon footprint we all know who should be at the top of the list.

Follow Dean on Twitter: @iiDeanB1

Happy Earth Day – Look to these Stock to Support Mother Earth and Boost Your Portfolio Performance

Investors are taking a deeper dive into corporations, looking beyond financial metrics and into a company's Environmental, Social, and Governance (ESG) standards as a measure of its commitment to all stakeholders, including a healthier planet.

Last year, Laurence Fink, the Founder and CEO of BlackRock, the world's largest asset manager, sent a letter to the CEOs

of its invested companies and a second letter to its clients, addressing a focused mandate on sustainable investing. BlackRock sees climate risk as investment risk and plans to act ahead of the serious impacts of climate change by doubling its number of ESG funds.

Below are four companies where ESG has become a critical part of their business or a core belief in building a more sustainable business environment.

1. Cielo Waste Solutions Corp. (CSE: CMC | OTCQB: CWSFF | FSE: C36)

Cielo is literally turning garbage into gas; it doesn't get much greener than that!

Cielo, a waste to renewable fuel company, has a patented technology that converts landfill garbage into renewable high-grade diesel used in transport trucks and kerosene used for aviation jet and marine fuel.

After 16 years and C\$75 million in research and development, and now a fully functional plant, Cielo is currently riding the "green wave" of investor interest in environmental tech, and the stock price has responded accordingly, up over 1,000% year-to-date.

Cielo is currently rolling out 10 facilities in North America over the next couple of years but with revenues expected from its first plant this year.

Read the latest story about Cielo here.

2. mCloud Technologies Corp. (TSXV: MCLD | OTCQB: MCLDF)

mCloud helps businesses reduce energy waste, maximize energy production and get the most out of critical energy infrastructure. It focuses on using Artificial Intelligence (AI) to curb energy waste in buildings, maximize the energy production of wind turbines and extend the lifespan of

critical energy infrastructure in a variety of different industries.

mCloud recently rolled out a new service that detects the leakage of gases during oil and gas production that will drive major carbon emission reductions for its customers in Alberta and the Middle East.

And yesterday, mCloud announced a partnership with three North American energy utility providers to offer its energy-saving solutions for HVAC and improved indoor air quality (IAQ) monitoring solutions that could target over one million commercial buildings in the U.S. and Canada.

Read about yesterday's news release [here](#).

3. Nano One Materials Corp. (TSXV: NNO)

Nano One Materials is a technology company with a patented and scalable industrial process for the production of low-cost, high-performance cathode materials used in lithium-ion batteries.

The cathode determines the battery's capacity and voltage, and can comprise 20% or more of the costs of a lithium-ion battery.

Nano One's proprietary "One Pot" furnace process creates a coated single crystal powder that protects the cathode from side reactions while allowing the transfer of lithium ions between electrolyte and cathode.

And, importantly, the process addresses ESG concerns around energy, waste, and carbon footprint in the lithium-ion battery supply chain. It is an environmentally friendly process using limited water, and as it eliminates intermediate steps, it eliminates expensive and energy-intensive metal conversions and does not have a hazardous waste stream.

See the latest video about Nano One Materials [here](#).

4. Neo Lithium Corp. (TSXV: NLC | OTCQX: NTTHF)

Neo Lithium is advancing its 100% owned Tres Quebradas (3Q) project, a high-grade lithium brine lake and salar complex in Argentina. The 3Q Project is located in Latin America's "Lithium Triangle" and covers 350 KM² (~86,500 acres) in the largest lithium-producing area in Argentina.

Last week, Neo Lithium announced that it engaged Golder Associates and the Argentinean National University of San Martin, to help with the ESG program as part of its Feasibility Study for 3Q project.

Waldo Perez, CEO of Neo Lithium said, "We take very seriously our compromise with all of our stakeholders and future generations, which in large part includes all aspects of ESG."

Neo Lithium wants to be at the low end of the CO₂ emission footprint when compared with other lithium brine projects.

Read the latest story about Neo Lithium [here](#).

Happy Earth Day, Do Something Nice for Mother Earth.

Nano One's Dan Blondal on reducing the carbon footprint in the lithium-ion battery

supply chain

In a recent InvestorIntel interview, Chris Thompson spoke with Dan Blondal, CEO, Director & Founder of Nano One Materials Corp. (TSXV: NNO) about Nano One's M2CAM (metal to cathode active material) technology that can reduce cost, waste, and carbon footprint in the lithium-ion battery supply chain.

In this InvestorIntel interview, which may also be viewed on YouTube (click here to subscribe to the InvestorIntel Channel), Dan went on to explain how Nano One's patented One-Pot process can produce cathode materials directly from metal using nickel, manganese, and cobalt metal powder feedstocks eliminating the need for costly and energy-intensive conversion of nickel, cobalt, and manganese to sulfate, and lithium to hydroxide. He said that the process can "transform the supply chain and make it much cleaner and greener and cheaper because we eliminate the steps in between."

Nano One recently achieved TSX Venture 50 recognition as a top-performing company and is focused on improving the performance of the cathode materials and ultimately the durability of lithium-ion batteries. "We have a process of making cathode materials and we can make all the different types of chemistries that are applicable to any type of lithium-ion battery you can think of," Dan added.

To watch the full interview, click here.

About Nano One Materials Corp.

Nano One is developing patented technology for the low-cost production of high-performance battery materials used in electric vehicles, energy storage, consumer electronics, and next-generation batteries. The processing technology addresses fundamental supply chain constraints by enabling wider raw materials specifications for use in lithium-ion batteries. The process can be configured for a range of different

nanostructured materials and has the flexibility to shift with emerging and future battery market trends and a diverse range of other growth opportunities. The novel three-stage process uses equipment common to industry and Nano One has built a pilot plant to demonstrate high volume production and to optimize its technology across a range of materials. This pilot plant program is being funded with the assistance and support of the Government of Canada through Sustainable Development Technology Canada (SDTC) and the Automotive Supplier Innovation Program (ASIP) a program of Innovation, Science and Economic Development Canada (ISED). Nano One also receives financial support from the National Research Council of Canada Industrial Research Assistance Program (NRC-IRAP). Nano One's mission is to establish its patented technology as a leading platform for the global production of a new generation of nanostructured composite materials.

To learn more about Nano One Inc., [click here](#)

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If you have any questions surrounding the content of this interview, please email info@investorintel.com.

Nano One Performs Well in Solid State Battery Tests at the University of Michigan

Nano One Materials Corp. (TSXV: NNO) reported this week that its technology performed well in solid-state battery testing with the University of Michigan (UM).

UM's battery laboratories are exploring various aspects of battery components, designs, interfaces, and assembly of solid-state electrochemical batteries.

Nano One focuses on its patented process for the production of cathode materials used in lithium-ion batteries and is collaborating with the UM on the development of innovative

solid-state battery technology.

Richard Laine, Ph.D., Professor of Materials Science and Engineering at the UM commented, "Initial results from our evaluations show that Nano One's HVS materials perform well with our innovative agricultural waste derived electrolytes and we look forward to advancing our collaboration to demonstrate a viable solid-state battery configuration."

Cathode Key for Power and Reducing Costs

The cathode determines the battery's capacity and voltage, and can comprise 20% or more of the costs of a lithium-ion battery. Nano One has developed technology for the low-cost production of high-performance lithium-ion battery cathode materials used in electric vehicles, energy storage devices, and consumer electronics.

Nano One has programs underway with multiple academic research groups, automotive equipment manufacturers, and battery manufacturers to test its lithium-nickel-manganese-cobalt-oxide (NMC) and high voltage spinel (HVS), also known as lithium-nickel-manganese-oxide (LNMO), cathodes in different solid-state battery systems.

LNMO cathodes have garnered industry attention by providing a low-cost, fast charging, and cobalt-free solution, key in cost-effective, large-scale commercial applications.

In December 2020, Nano One announced that it entered into a cathode evaluation agreement with an undisclosed, American-based, car manufacturer. This agreement is in addition to the deals announced with Volkswagen, Pulead, Saint Gobain, and an undisclosed Asian cathode producer.

Nano One's proprietary "One Pot" furnace process creates a coated single crystal powder that protects the cathode from side reactions while allowing the transfer of lithium ions between electrolyte and cathode.

In addition, the “One Pot” process offers the flexibility to use either lithium carbonate or lithium hydroxide as the reaction with the other metal inputs is indifferent to the type of lithium input and produces a finished cathode powder when thermally processed in a furnace.

It is also an environmentally friendly process using limited water and produces no waste stream as it eliminates intermediate steps and by-products in the process.

The Basics of Battery Technology

Reduced to its basics, a lithium-ion battery consists of 4 components: (1) a Cathode, the source of the lithium ions, (2) an Anode, the storage area of released lithium ions, (3) the Electrolyte, the medium which helps the ions flow, and (4) the Separator that prevents contact between the Cathode and the Anode.

The chemical reaction creates a voltage potential between the cathode and the anode. The voltage is the electrical force from the power source, the higher the voltage, the more power it can send to the load, such as a motor.

A solid-state battery uses solid electrodes and a solid electrolyte, instead of liquid or gel electrolytes, found in conventional lithium-ion or lithium polymer batteries. As a solid-state battery can handle more charging and discharging cycles before degradation, it promises a longer lifetime.

In November 2020, Nano One reported that its HVS cathode when paired with a conventional electrolyte and a graphite anode achieved over 500 fast charge and discharge cycles at 45°C and also reached 1000 fast charge and discharge cycles at 25°C. These durability test results confirmed that its technology is stable at elevated operating temperatures required for automotive, power tools, and energy storage applications.

Cashed Up to Reach Commercialization

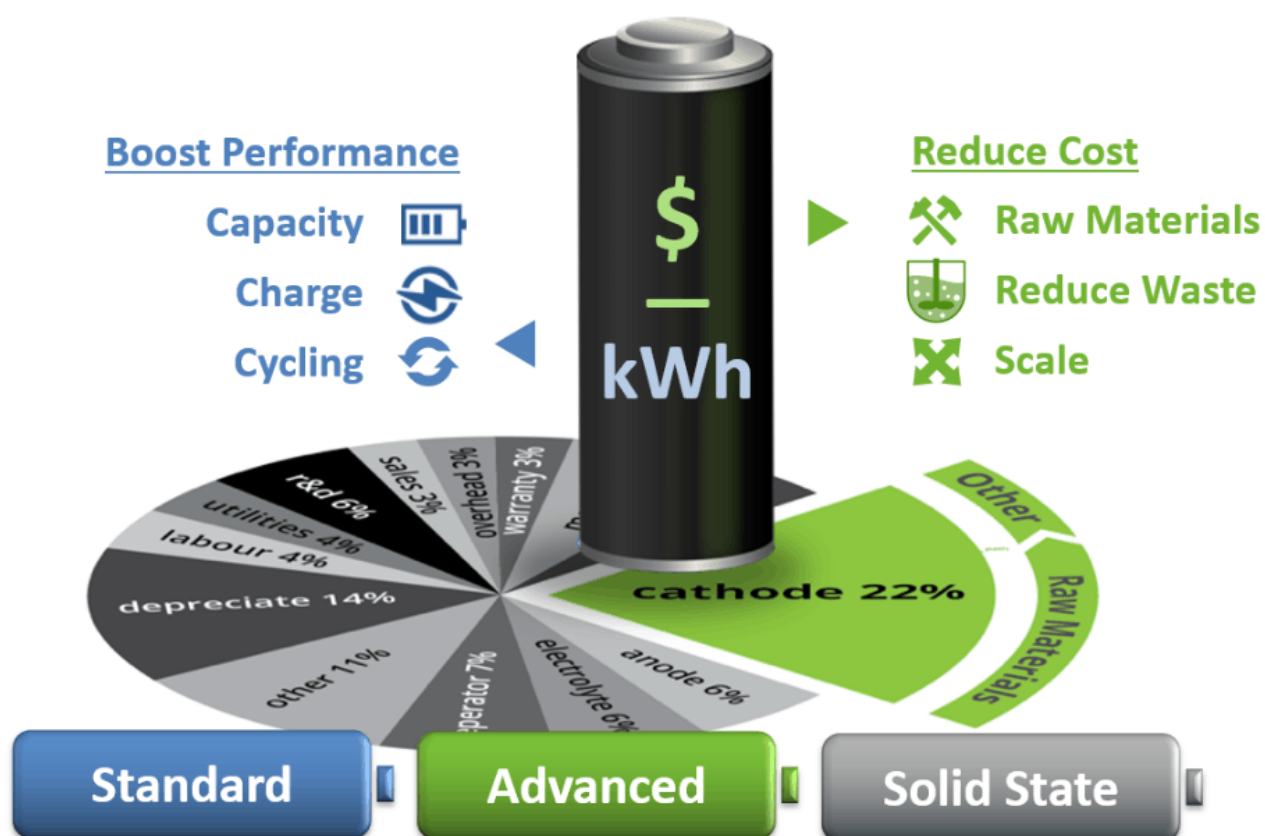
Recently, Nano One announced it received \$4.46 million from the exercise of stock options and warrants since its last financial update dated October 1, 2020, and brings the company's cash balance to approximately C\$28 million, including \$14.37 million the company raised in October 2020.

Final Thoughts

Nano One's technology is well-positioned to capitalize on the opportunities in the battery technology industry as economies shift to electrification efforts from solar, wind, and electric vehicles to reduce greenhouse gas emissions from fossil fuels.

This week, the Toronto Stock Exchange (TSX) Venture Exchange's named Nano One to its "2021 Venture 50", an annual ranking of the top-performing companies on the exchange. Companies are selected based on share price appreciation, trading volume, and market capitalization growth. Nano One's stock price is up almost 300% in the past year.

Even with the recent stock price increase, there is plenty of market opportunity for the company. Nano One estimates the global cathode market could reach US\$27 billion by 2026 and the company is focusing on potential licensing partners for its technology that should mitigate some of the risks.



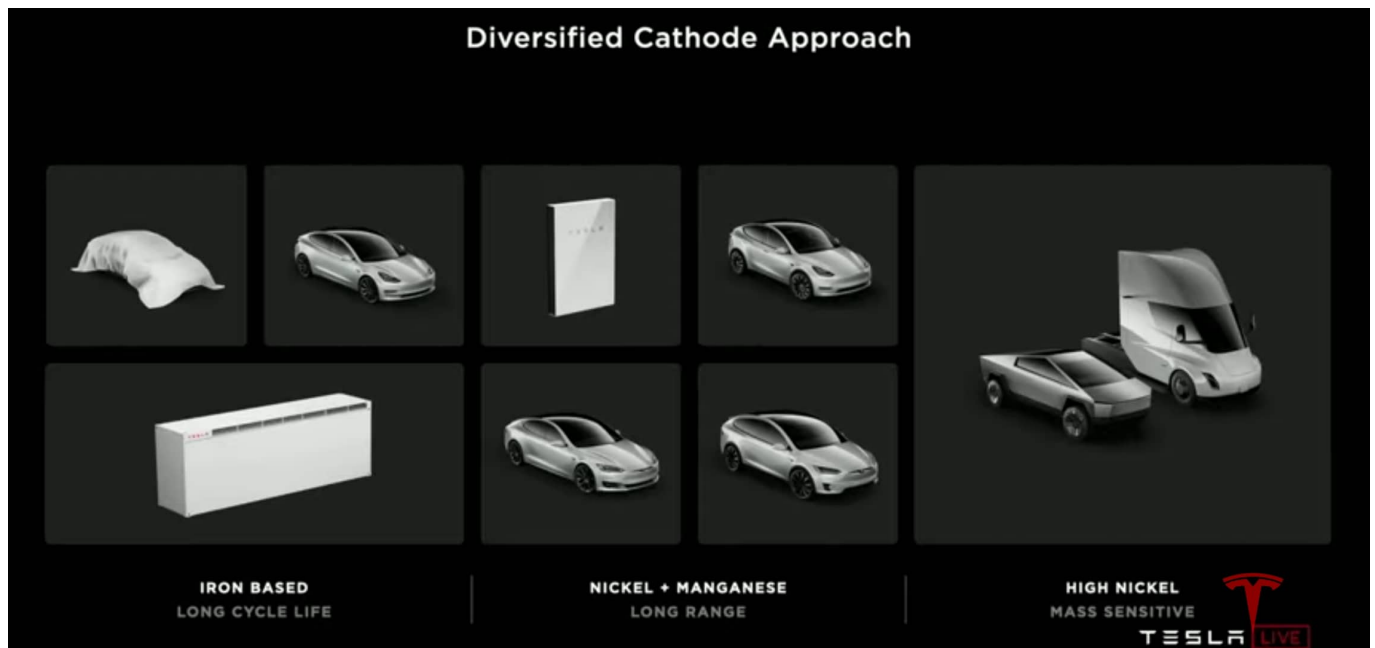
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Nano One looks to be moving in the same direction as EV leader Tesla

At Tesla Battery Day in September 2020 Tesla discussed how they plan to have a three prong approach to batteries – Lithium Iron Phosphate (LFP), **Nickel Manganese (NM or LMN)**, and high nickel (NCA or NMC). Today I look at the nickel manganese battery and a company that is moving in the same direction as Tesla. That company is Nano One Materials Corp. (TSXV: NNO) (“Nano One”).

Tesla’s planned mix of battery cathode types – Li Iron

Phosphate (LFP), Nickel-Manganese (NM), high nickel (NCA) (NMC)



Source

Nano One specializes in improving battery cathodes. In particular the Company's focus is to make low cost, high performance, cathode powders used in lithium ion batteries.

In October 2020, Nano One announced that they have developed a breakthrough in longevity for a cobalt free high voltage battery that has been successfully demonstrated at automotive rates of charge and discharge for over 900 cycles. The battery uses a low cost, cobalt-free **Lithium Nickel Manganese (LNM)** cathode active material made with Nano One's proprietary One-Pot process.

The problem with removing the cobalt can be that the battery becomes less stable or has a lower lifespan (less cycles). However in this case Nano One has managed to achieve 900 cycles, which is heading towards the 1,500 cycles that a Tesla Model 3 achieves using a more expensive nickel-cobalt-aluminum (NCA) battery. The other reason for removing cobalt is that the world supply of cobalt is limited and mostly comes from the Democratic Republic of the Congo – A country rampant with

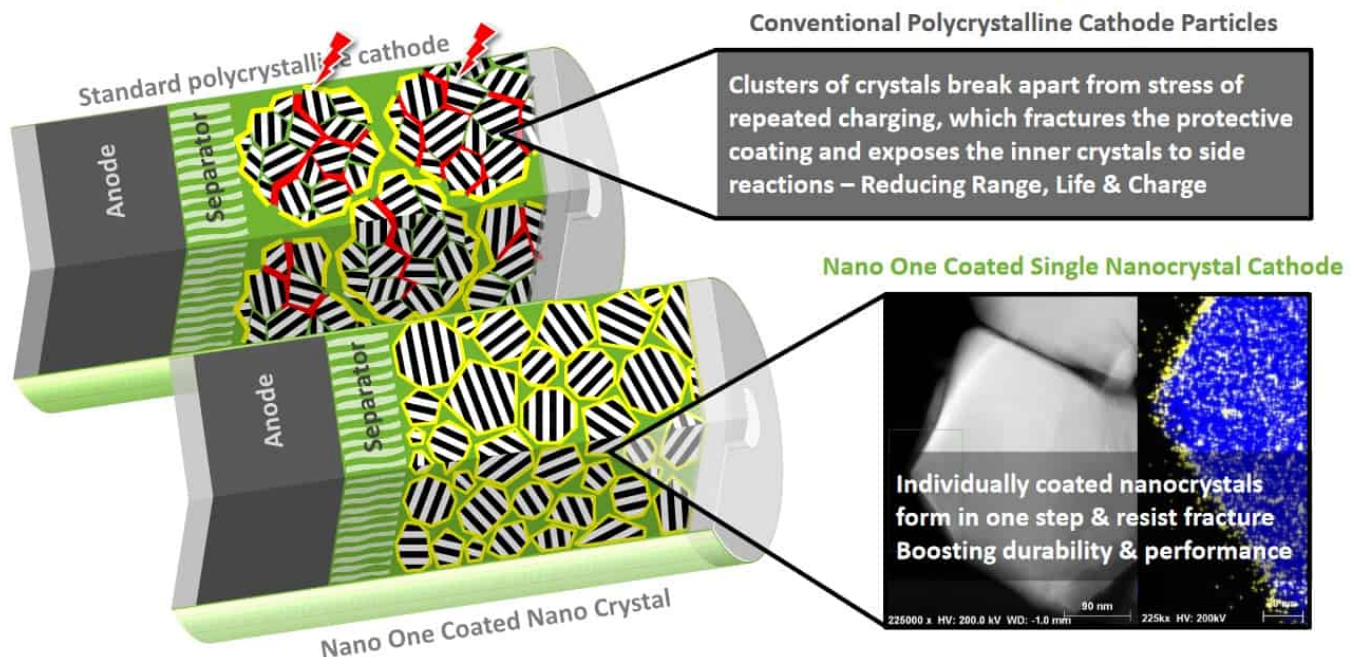
issues such as corruption, child labor and exploitation. Many analysts are forecasting severe cobalt supply shortages after 2023 just as the EV boom takes off. This explains why Tesla and Nano One are working towards a nickel-manganese battery with no cobalt.

Nano One's Chief Technology Officer Dr. Stephen Campbell explains:

"We are able to avoid rapid capacity fade and premature failure and have successfully demonstrated a high voltage lithium ion battery cell with significant cycle life – this is an exceptional outcome. The enabling technology is Nano One's patented LNM cathode material operating up to 4.7 volts and made using our patented One Pot process. **The LNM voltage is 25% higher than commercial lithium ion batteries, improving efficiency, thermal management and power.**"

Nano One's Coated Single Nanocrystal Cathode gives a performance advantage

Nano One Performance Advantage



Source

In June 2020, Nano One announced the development of a coated,

single crystal cathode material for lithium ion batteries that is providing **up to 4 times improvement in longevity**. The technology is applicable to all of Nano One's cathode materials.

Perhaps not surprisingly, Nano One was able to raise an oversubscribed equity raising of approximately \$14.37M at an offering price of \$2.72 per Unit (one share and half a warrant). The Company intends to use the net proceeds for research and development, capital equipment purchases and facility expansion, intellectual property acquisition, business development, working capital and general corporate purposes.

Nano One continues to have successful breakthroughs in improving lithium-ion battery cathodes, most importantly in all types of cathodes (iron based, nickel-manganese, and high nickel-cobalt). Combine this with their excellent established development partners Pulead (the global leader in LFP cathodes), Volkswagen (a leading OEM), and Saint-Gobain then it should not be surprising to see Nano One start to commercialize their patented technology in the near future.

The global cathode market is forecast to be a US\$23 billion market by 2025 and includes a US\$1 billion potential licensing opportunity which Nano One is targeting. Nano One's goal is to achieve ~\$70M pa in revenues by 2025 at high profit margins.



Nano One's stock is up 118% over the past year so early investors are certainly being rewarded. With the EV boom set to accelerate due to Tesla's planned US\$25,000 car by 2023, it should leave plenty of opportunity for Nano One to make their mark.

The million mile battery is ahead for electric vehicles – and investors

Nano One positioned for great things as the EV boom approaches

Superior battery technology continues to move towards significant breakthroughs such as the ‘million mile battery’ and ‘low cost/fast charging’ lithium ion batteries. These new advances will act as a huge boost for electric vehicle (EV) sales and allow the next generation of EVs to become super competitive with conventional cars. The **million mile battery** suddenly makes EVs the preferred choice for fleet operators (taxis, hire cars, deliveries, trucking etc) and the cheaper/fast charging batteries mean that by 2022 we should start to see EVs reach price parity with conventional cars. This will lead to a tsunami of EV sales.

All of this is only possible because of scientific breakthroughs by leading companies such as Nano One Materials Corp. (TSXV: NNO). Car and battery manufacturers are jumping onboard so that they can remain competitive in a rapidly changing auto world. Volkswagen’s partnership with Nano One is just one of many examples.

Understanding the massive changes happening in the auto industry helps explain why Nano One’s stock is up 145% over the past year as investors start to see their potential of the predicted US\$23 billion cathode market opportunity. Specifically, Nano One is targeting the licensing opportunity

to improve cathodes estimated at \$1 billion in annual revenues by 2025.

Nano One's mission is to establish its patented technology as a leading platform for the global production of **a new generation of battery materials**. Nano One has developed patented technology for the low-cost production of high-performance lithium ion battery cathode materials.

Nano One is targeting a potential \$1b licensing opportunity in the \$23b cathode market by 2025

 Source

Investors might think that it is too late to buy into Nano One looking at recent stock price gains, but actually on the current market cap of C\$239m if Nano One can deliver the potential revenues below as per their targets the stock will have appeared cheap. This is because they are targeting about \$70m a year in revenues by 2025 and profit margins are expected to be extremely high.

Nano One potential revenues by 2025



Source

Nano One's patented cathode used for the 'million mile battery'

Nano One announced in June this year the development of a coated, single crystal cathode material for lithium ion batteries that is providing **up to 4 times improvement in longevity**. The technology is applicable to all of Nano One's cathode materials but is especially relevant to lithium nickel manganese cobalt oxide (NMC811). According to Nano One, "Increased durability is critical in enabling extended range, faster charging and even million mile batteries for electric

vehicles.”

This breakthrough makes the ‘million mile battery’ within reach. Such a battery would mean EVs can last at least 4x longer than a conventional car. The implications are enormous. Fleet operators will be lining up to buy EVs with million mile batteries.

Nano One’s other key projects (LFP cathodes, and solid state battery cathodes)

Nano One has also made great progress in reducing the cost and improving the performance of Lithium Iron Phosphate (LFP) cathodes. Nano One has developed patented ‘one-pot cathode materials and production processes’ that reduces both the time and cost of LFP production. Working with partners such as Pulead who specialize in LFP cathode production opens up the door for licensing opportunities.

Nano One is also working on a breakthrough for the ‘holy grail’ of batteries – a solid state battery. Nano One’s patented cathode tests positively in solid state batteries with auto companies. Nano One says that their “cobalt free cathode reduces supply chain risk, increases power and enables fast charging,” and their “coated nanocrystal cathodes (single crystal) boost durability, capacity and charge rates.”

Nano One is partnered for success

Nano One is very well partnered into the EV/battery supply chain via partnerships with industry giants Volkswagen, Pulead, Saint-Gobain and other undisclosed global automotive interests. Added to this they have had the support of the Canadian government.

Closing remarks

With so many breakthroughs in one year it is little wonder that Nano One’s stock price is up 145%. Great management,

great technology, and great partners are always a winning formula.

Nano One currently has a market cap of C\$234m and looks poised for great things as the real EV boom is just about to begin.

Further learning

- Dan Blondal on Nano One's breakthrough in lithium-ion cathode materials and the 'million mile battery' (video)