

What stocks and sectors to win in the US Presidential election

written by InvestorNews | November 2, 2020

With the US Presidential election on November 3 many investors are looking at the implications of a Trump win versus a Biden win. Based on the current polls Biden is ahead which means some of the Biden related stocks have already partially priced in a Biden victory.

Sectors and stocks to do well if Trump wins

If we see a [President Trump victory](#) this week then investors can expect more of the same from the past 3 years in office. Trump is likely to continue with the China trade war and his tariff policy, which has so far had mixed results. Agriculture (soybeans etc.) has suffered some severe ups and downs as China retaliated then appeased Trump. [Chinese student education and tourism to the US](#) is significantly down.

Sectors that have generally been favored under Trump include oil/gas/coal/nuclear, military, possibly financials, possibly technology, and some industrials. Trump's policy to reduce corporate America's tax rate from 35% to 21% was a huge win for corporate America and it helped boost stock markets at the time. The recent September 30 White House [Executive Order](#) ('EO') on critical minerals is aimed to give a huge boost to the critical minerals mining sector and supply chain, especially for US based projects.

Some stocks and funds likely to do well in a Trump victory include oil/gas/coal/nuclear such as SPDR S&P Oil & Gas

Exploration & Production ETF (XOP) (assumes COVID-19 eases and oil prices increase), Exxon Mobil (XOM), [Energy Fuels Inc.](#) (NYSE American: UUUU | TSX: EFR), [Ur-Energy Inc.](#) (NYSE American: URG | TSX: URE); defense stocks such as Northrop Grumman Corp. (NOC), Lockheed Martin Corp. (LMT), Raytheon Co. (RTN), and General Dynamics Corp. (GD); financials such as Bank of America (BOA), JP Morgan Chase (JPM); and the tech giants (Facebook FB), Amazon (AMZN), Alphabet (GOOGL) etc); US based critical minerals miners MP Materials Corp. (MP)(FVAC), [Neo Performance Materials Inc.](#) (TSX: NEO), and the other US critical mineral miners.

China related shares and funds would likely not do well if Trump wins and the recent renewable energy and EV stocks rally might reverse.

Donald Trump continues with 'make America great again'



[Source](#)

Sectors and stocks to do well if Biden wins

Biden's policy proposals are aimed at [restoring equality and boosting the middle class](#) as well as US manufacturing. Biden plans to work with other nations to solve global conflicts and less conflict with China. His other key policy pillar is green energy ('[green new deal](#)'). Biden's green plan is for the U.S. to have a carbon pollution-free power sector [by 2035](#). This would be a massive boost to the renewable energy sectors such as solar and wind energy as well as more support to the electric vehicle (EV) industry. Biden also plans to boost spending on rural areas, agriculture, healthcare, child care and caregivers, as well as helping to reduce student debt and raising the US minimum wage to \$15/hour. He plans to boost R&D spending by \$300 billion on electric vehicles (EVs), lightweight materials, 5G

and artificial intelligence. To do all this he plans to raise corporate tax rate from 21% to [28%](#), and to [raise taxes](#) on individuals with incomes above \$400,000, including raising individual income, capital gains, and payroll taxes. Also some capital gains tax increases for those on [incomes above \\$1,000,000 pa.](#)

Some stocks and funds likely to do well in a Biden victory include solar energy stocks and solar ETFs (TAN), SolarEdge Technologies Inc. (SEDG), First Solar (FSLR), Brookfield Renewable Partners LP (BEP), NextEra Energy (NEE); wind energy and wind stocks (FAN); US electric vehicle stocks such as Tesla (TSLA), Fisker (FSR); EV charging companies Blink (BLNK); and the miners that provide the raw materials for the clean energy sector. This would include miners in rare earths, lithium, cobalt, graphite, nickel, manganese, aluminum, and scandium etc. Also emissions reducing stocks such as [dynaCERT Inc.](#) (TSX: DYA | OTCQX: DYFSF) stand to benefit. US healthcare stocks such as United Health Group (UNH) and those focused on COVID-19 treatment and prevention should do well as Biden increases COVID-19 testing and therapies and [drops medicare eligibility from 65 yo to 60 yo.](#)

Joe Biden plans to help fix inequality and boost the middle class



[Source](#)

Sectors and stocks to do well no mater who wins

The technology sector has done well under Trump boosted by the corporate tax cut; however it is also likely to continue to do ok under Biden, despite a short term pull back due to higher corporate taxes. There is the Democrats (Biden) threat of more

regulation and possible breakups of big tech; but under Trump there is also greater pressure on big tech such as the recent [Alphabet Google anti-trust lawsuit](#). Expanding rural broadband internet access under Biden is a small positive for tech.

The infrastructure sector should do well. If Trump wins the infrastructure to do well will be more based around older infrastructure such as highways, pipelines, and traditional energy (oil, gas). If Biden wins the benefits will go towards newer infrastructure such as his [\\$2 trillion green infrastructure and jobs plan](#) over his first term in office.

US critical materials related stocks look set to do well both under Trump and Biden.

Gold and precious metals will likely do well no matter who wins assuming continued US stimulus and money printing.

Closing remarks

InvestorIntel has no political bias, but rather seeks to help investors make informed decisions.

As a general rule if Trump wins the US election investors can expect the same stocks and sectors that did well the past 3 years to continue to do well. The best performing sector has been US technology. The lower corporate tax rate is a plus for US corporates in general.

If Biden were to win the winning sectors and stocks relate mostly around stocks that benefit from a supported lower and middle class, renewable energy including EVs, and government support (health care, child care, aged care).

Finally, how the US deals with the China trade war, COVID-19, and geo-political events going forward will also play a significant role in the US stock market over the next 4 years.

Good luck to all.

The Astrologers Fund Henry Weingarten forecasts gold, critical materials and Trump for fall

written by InvestorNews | November 2, 2020

Henry Weingarten, Fund Director of The Astrologers Fund, Inc., spoke with InvestorIntel's Tracy Weslosky on near term prospects for gold and critical materials. "In November and December gold will do very well no matter who wins," Henry stated. He also commented on the likely market scenario if Donald Trump loses election.

Henry went on to say that President Trump's Executive Order on Critical Minerals will boost the critical minerals stocks in the short term and added, "Lithium is going double in 2022." He also said, "China will be very belligerent next year that will help military stocks. Military and security will be front and center next year."

To access the complete interview, [click here](#)

Invitation for Trump to join Lifton on the Technology Metals Show to discuss the Critical Materials Executive Order issued yesterday

written by Tracy Weslosky | November 2, 2020

This morning I raced through Fallon, Kimmel, Corden and Colbert as I do every morning with a cup of coffee. The idea? Hit the ground running having enjoyed the late-night talk show hosts translations of the news events from the day before...

Henry Weingarten doesn't understand why I cannot commit to a [follow up interview](#), he's right – we need one. After all, in our last interview he forecasted everything from who will win the Presidential election to a bullish graphite, gold and media market this Fall. Undoubtedly we would all like to know what percentage of forecasts he is making on our capital markets that are right and which ones are wrong. Alright, we will get this done and live by next week.

Reviewing the emails, Russell Fryer of [Critical Metals PLC](#) (LON: CRTM) alerted many of this AM to the [Executive Order on Addressing the Threat to the Domestic Supply Chain from Reliance on Critical Minerals from Foreign Adversaries](#) that was published on the White House site yesterday.

Russell adds in his email: “The use of the term ‘foreign adversaries’ is quite a strong phrase, designed and inserted to call out China...” He then adds his summary points of interest:

1. the United States develops secure critical minerals supply chains that do not depend on resources or processing from foreign adversaries. (i.e. China)
2. the United States develops globally competitive, substantial, and resilient domestic commercial supply chain capabilities for critical minerals mining and processing.
3. reduce the vulnerability of the United States to the disruption of critical mineral supply chains through cooperation and coordination with partners and allies, including the private sector
4. build resilient critical mineral supply chains, including through initiatives to help allies build reliable critical mineral supply chains within their own territories

OK, thanks Russell and kudos on listing Critical Metals PLC in London earlier this week, we are all watching to see what you do next.

Now Trump? While the content of this Executive Order is unquestionably of great interest to me and my associates in this sector, why wasn't Trump busy investing in how to clean up his post debate mess is of great interest to me. Experts tell me that the positive he is doing for critical materials will continue no matter who becomes President this Fall, but it does makes it hard to communicate what I deem to be a very positive action on his behalf when he is **not** behaving like a gentleman.

For the record, talkative is fine. After all, rare earths' experts are exceptionally talkative....

In fact, I was speaking with Jack Lifton earlier this last week and asked him about a new editorial candidate for InvestorIntel to do a regular column on our sector, and his response to one candidate was "he's good, but if you ask him the time, he will give you the history of how time was created."

My point? Give us Trump for the Technology Metals Show and I will have no challenge being the moderator with Jack Lifton as I am used to strong driven communicators with passionate positions on why we should all be buying their stock. On that note I would like to personally extend an invitation for President Trump to be on the Technology Metals Show and have Jack Lifton interview him on this Executive Order?

Now why will this work? It will work, because we are all on the same side here...when it comes to our North American issues around sustainability, we all agree. No one should ever be solely reliant on one nation for all of our Technology Metals.

See a theme here?

Before I change the point here, yes, I do plan on asking Ron Wortel to write a piece on this order ASAP. Why Ron? Well in a conversation with Ron yesterday in discussions about him taking on a regular moderator role of a critical materials editorial board (this clever idea was suggested to me by Jeff Green and his team at J.A. Green & Company last week). Ron was discussing his history in rare earths, and you know what? I think he can do it and do it well. Ron's style is understated and many of us enjoy reading well done text that is written by knowledgeable professionals that understand the business...you will of course tell me what you think – you always do.

Alright, I am running to go assist Raj Shah on putting together a Top 20 InvestorChannel Watchlist of graphite companies today. Would like to thank Julie Pacquet of [Nouveau Monde Graphite Inc.](#) (TSXV: NOU | OTCQX: NMGRF) for being the catalyst of this idea.

On a final note I am going to start calling out 'flags on the field' of the capital markets and today I would like to highlight an analyst who did what I deemed a 'smackdown' on another rare earths company in an eblast I received yesterday.

Let me add, I have grown weary of advising him that his content is not my friend and have been unsuccessfully and getting off of his darn list, but hey this is simple.

How can you call out other critical material company when you sit on Boards and are presently raising funds for your own company (in the same sector of course)? When are we as investors simply going to build a wall for you and insist that you not climb over it? Consider this my brick, and as I have told you before – why can you not just market yourself without tearing someone else down, especially when you do not know what is going on.

It seems we have analysts that could use a brush up on professional behavior as well.

Enjoy your day, we will get Mr Weingarten set up for an interview, finish the InvestorChannel Graphite Watchlist, and attempt to get the news release written on the new Investor Talks video meeting series and in your inbox by Friday afternoon.

If you would like to subscribe to Investor Talks, [click here](#)

The Rare Earths War

written by InvestorNews | November 2, 2020

[Technology Metals Show](#) host Tracy Weslosky moderates a timely discussion on how China poses a serious threat to the rare earths supply chain security of the United States, talking to international rare earths expert Jack Lifton and the Editor of “The Rare Metals War” Guillaume Pitron. Guillaume observed that

Donald Trump as the President has been tackling the rare earths supply chain issue like no one ever done in this role. He added, "If he is re-elected, I believe, that is going to impact in a good way the US production of rare earth minerals and rare earth metals."

Jack agreed with Guillaume and added, "Trump is the first president to refocus on globalization, and he is trying to de-globalize critical materials for the security of the United States." Highlighting the seriousness of the rare earths supply chain problem, Jack said that Shin-Etsu and Hitachi, two large Japanese companies that supply rare earth magnets to the US military, have most of their production in China.

Jack also revealed that China recently announced that they would cut off Northrop Grumman, an American defense technology company, from all Chinese rare earth materials. "What Americans don't seem to be paying attention to," Jack continued, "is Grumman is the producer of the F-35 fighter plane, the greatest air superiority weapon in history. Grumman needs those rare earths to build those planes. This is going to bring real pressure on the defense department."

To access the complete interview [subscribe](#) to the [Technology Metals Show](#) and get exclusive access to members-only content through this exclusive site. Or [Log-In Here](#) for the latest conversations, debates, updates and interviews with the leaders, thought leaders and investors focused on issues relating to sustainability in the critical materials sector.

For more information on the [Technology Metals Show](#) email us at info@technologymetals.com or reach us direct at +1 (416) 546-9233

Prophecy's Oosterman on being the only U.S. player for vanadium supply

written by InvestorNews | November 2, 2020

June 26, 2018 – “China controls about 56% of the vanadium in the world. The other two big players are Russia and South Africa. As a result, of course, it has been deemed as a strategic metal. The United States, for example, imports about 99% of its vanadium. It is a key metal in construction. It is a key metal in the aerospace industry. Really this is where our project is poised to basically be the only player in the United States for vanadium supply.” states Danniell Oosterman, Vice President of Exploration at [Prophecy Development Corp.](#) (TSX: PCY | OTCQX: PRPCF), in an interview with InvestorIntel Corp. CEO Tracy Weslosky.

Tracy Weslosky: Vanadium is one of those critical materials with regards to a lot of sustainability issues that are currently happening today that very few people understand. Would you mind giving us kind of an introduction to vanadium?

Danniell Oosterman: Vanadium, even though it is not widely known about, it is widely used and widely applied in a number of applications. The principle application is actually steel. 92% of vanadium used in the world is used in steel. A small percentage added to steel actually doubles the strength and lightens it by 30%. As such it is ideal for, not only, rebar in construction and steel for skyscraper and such, but actually it is very useful in the aerospace industry as well.

Tracy Weslosky: Of course, we cannot forget the electric vehicles and the battery storage sector.

Danniel Oosterman: The battery space is a growing space, lots of excitement. You have a lot of big players, key players, like Robert Friedland, now are paying attention to it. That really puts us in a position where we with our project may be able to access every single one of these aspects, aerospace, chemical industry, steel industry, with our project in Nevada.

Tracy Weslosky: Respectfully, to Robert Friedland, which we all know in the resource sector, we have major players, mainstream players, like Elon Musk, that are drawing attention to the requirements for vanadium in their batteries. Give us a little bit of an overview of vanadium. We know that the Chinese control 90% of the rare earth and 80% of the graphite. What do the Chinese control of vanadium?

Danniel Oosterman: Well, Tracy, China controls about 56% of the vanadium in the world. The other two big players are Russia and South Africa. As a result, of course, it has been deemed as a strategic metal. The United States, for example, imports about 99% of its vanadium. It is a key metal in construction. It is a key metal in the aerospace industry. Really this is where our project is poised to basically be the only player in the United States for vanadium supply for the United States. That really just puts our project in an advanced position. If you look at the political landscape in the United States, with Donald Trump deregulating a lot of things, he recognizes a lot of strategic value of certain metals. Principle of that, and we have had discussions with the Federal government in the United States regarding this, our project in particular is a high priority project because vanadium is considered one of these critical metals in the strategic sense that Trump has raised concern. As such we will essentially anticipate that we would move to the

front of the queue in terms of our project going ahead and eventually put it into production...to access the complete interview, [click here](#)

Disclaimer: [Prophecy Development Corp.](#) is an advertorial member of InvestorIntel Corp.