



## MEMBER SURVEY MAY 2022

Question 20 of our 2022 Member Survey was this:

**“Do you have a stock tip, theme or a bit of (legal) inside information about your own industry or business to share with other members”**

Here are the 600 odd answers – your stock tips. Note the date – June 2022. Don't want you reading this in December 2023 and thinking its still current! There are a few recurring themes and stocks in here. As usual, the stocks and sectors that have already gone up the most, and most recently, are the ones that get mentioned the most, but if you dig around there are some good 'unpopular' insights in here that will have you researching stocks you don't hold (yet).

To sum up some of the most popular mentions – popular sectors include Lithium (48 references), Energy and Agriculture, and from a stock point of view there were 21 references to Macquarie (MQG) and 12 to Pilbara Minerals (PLS) plus a host of other popular stocks.

Enjoy.

- 29M - My long association with the mining industry and management leads me to the best, lowest risk, undervalued copper play in Australia, 29M.
- 4DS
- 4DS - it's getting very close to results.
- A portfolio of mostly top 20 ASX stocks can be the mainstay. Say 70%. Learned this over time.
- A way too high % of the pros under-perform their benchmarks, so you really have to justify why you're not in a market fund.
- AAC – the value of their underlying agriculture assets too low even after announcement 9th May. At a 20% discount to asset value. Potential takeover target although one cornerstone investor UK based. Tatterang sub.
- ABB - Aussie broadband an Australian broadband industry disruptor doing good things in B2B segment.
- About to go into production and the stock is not yet widely covered and relatively undervalued."
- ADA, CSL, MCA, and LRK.
- ADH
- ADO - be patient and it could well be a 10 bagger.
- Advanced manufacturing in Australia. Strong tailwinds from government support.
- Aged care is a near recession proof business if operated correctly, an unlimited ROI. some publicly listed RV exposed entities are very afraid of it.
- Agree 100% with Henry about the battery theme.
- Agricultural technology related to increased sustainable food production eg ROO, WOA
- Agriculture - ELD, GNC – I have connections to the agricultural industry.

- Agriculture anything - World needs food and wheat/ canola prices are high. We are on a farm and grow both.
- Agriculture theme. The increasing challenge to feed the world in the face of wars, environmental constraints, etc provides huge opportunity to those who do low carbon agriculture well.
- AGY - All things related to electric vehicles and grid batteries.
- ALL - Growth with overseas business in expanding industry & good management.
- Alpha HPA(A4N) - High purity alumina produced without mining. Developed by a bunch of Aussie PhDs, under construction in Gladstone and has attracted government funding.
- AMN - More food requires fertilizer.
- AMS and BWX two stocks beaten up despite reasonable updates.
- An ETF such as STW which covers the top 200 ASX stocks.
- Any lithium stock at the moment.
- Any lithium stock, for a medium long term hold for the electrification journey.
- Anything Mark Creasy is investing in.
- Aristocrat (AAL) after the fall.
- As a farmer, I have to say agriculture has started look sexy (finally!) post-pandemic due to concerns about supply chains. Dairy stocks (Bega), GNC, ELD, IPL.
- As a momentum investor there is no one stock. Over the next 12 months it will be about lower PE's, dividends and growth. Back to basics with lower return expectations. Leading stocks will probably be profitable resource companies with low debt. Lower number of stocks in my portfolio with more rigor around them.
- As in the medical field do not really have any insight of value, i.e. I thought Alcidion (ALC) would not have halved in price in recent weeks.
- I have been far too cautious when it comes to Lithium. I was originally told by my accountant to buy NMT in 2018, I didn't. I have however traded it a few times along the way, but the whole sector was an all-in moment again when Henry started his Battery Pack. Again, shoulda, coulda, didnt!
- As you have said time and time again, we are at a pivot point in terms of the slow decline of the ICE, and the lithium theme has the potential to secure those that are in it, much wealth. That is where I shall also be guiding a 25, 20 and 18 year olds in the direction of.
- ASM - Been following this stocks progress since i stumbled over it in 2008. It will produce the first rare earth metals outside China.
- At the moment I am leaning towards resources and in particular uranium. I successfully traded two US stocks recently but want to come back to them when the charts and fundamentals improve.
- At these levels – ICI.
- Atomos oversold, great equipment for the video industry.
- AUC - a small Goldy building up the resources.
- Aurelia Metals (AMI) - Base metals and gold. In the next two years they will have 5 producing mines. Federation discovery has some of the richest drilling grades seen in Australia. The Great Cobar mine that closed in 1911 is being re-opened and it has a lot of copper and emerging gold. However management do little to no marketing.
- Australia is a mining country, little more - this is where we should be investing (not speculating) but timing is important.
- Australia is such a small country. Invest in ASX listed shares with significant offshore exposure.
- Australian mining shares.
- AZY – Antipa Minerals - You won't find a better minerals story, that so far has taken years to unfold, and we are just getting to juicy bit now. Three major Joint ventures with RIO, IGO, NCM - plus our own 100% land and gold deposit.
- AZY - Gives you exposure to Minyari, which is highly promising in itself. But also to three other deposits which are good enough to attract farm-ins from three major producers. All for about \$130 million.
- Battery materials for EVs and battery storage.
- Battery recycling long term.

- BCB. Next hard coking coal producer in QLD Bowen Basin. It is set to produce 5M tonnes pa of HCC within 2 years which has a market value of \$1.5B at a very conservative price of \$300/tonne. AISC estimated \$100/tonne. So gross margin circa \$1B pa. Market cap currently \$460M, EV \$420M. Massive upside in value
- Be contrary and not follow momentum stocks.
- Being a chartered accountant, recently I have taken a strong interest in Xero after its recent share price fall.
- BET
- BET business kicking off in the States where they are so far behind us in terms of betting and ready money access systems.
- Betmakers (BET) - Marcus Today Team need some credibility back over this disaster. *(Agree!)*
- BHP
- BHP
- BHP - Good dividends, big profits, great premiums on options.
- BHP - Multi faceted and low debt - About the only "Set and Forget" share for the next 30 years.
- BHP < 40
- Big five banks. I do not know the future but since 1992 they have done well.
- Biotech
- Biotech and Rare Earth mining are two areas where future demand is strong and historically Australia excels in these two fields.
- Bit of a punt, but Optiscan (OIL) is worth a look (if management do everything right). It's a good technology but previously, management has struggled to monetise it. Could go well if they get it right.
- Bought LTR from 2c up to \$1.50 in my super.
- BRK - B Berkshire shares even with recent market turmoil are still up 60% since purchase. No point trying to beat the best join them.
- BRN & AXE for AI future.
- Businesses in the built to rent properties space.
- Buy 90% blue chip and play with the rest. I had a parcel of mainly bank and Qantas shares that I got 20 years ago from the divorce worth 40K, haven't touched them, reinvested dividends, now worth 200K, even after this week's selloff, my run away money.
- Buy AX1 & BVS
- Buy gold miners before, but close to production e.g CAI, BGL.
- Buy healthcare stocks in a high inflation environment - we are all getting older!
- Buy Lynas Corporation (LYC) and hold it for the next decade. LYC dominates production of rare earth minerals outside of China, many of which are vital to the production of electronic devices, EV's and wind turbines. With the relationship between China and "the West" increasingly acrimonious, many Western governments and corporations are waking up to the urgent need to secure long-term supply of the minerals that LYC produces.
- Buy Macquarie (MQG).
- Buy MQG, BHP .
- Buy your wife flowers when it's not her birthday. The only thing to strip your capital by at least 50 percent other than following the interest rate beneficiary theme, is divorce. Flowers will always be better insurance than QBE, well until interest rates shoot higher and higher that is.
- Calix (CLX) - great technology with unlimited future opportunities.
- Calix (CLX) has been great.
- Canadian energy companies, they are cash generating machines, most now almost debt free, and cheap.
- Cannot choose between BHP and CBA, perhaps both .
- Carnarvon Energy (CVN) - Grossly undervalued and should double or triple in the next two years.
- CEL - potential large gold deposit. Speculative.
- Changed careers to become a bookkeeper and bought Xero at \$140 because it is that much better than everything else, now its \$80.

- Chrysol (C79) - I like companies that CSIRO have something to do with.
- Clean Energy sector.
- Cloud computing infrastructure builders like NXT and MP1 have long term growth and profitability potential.
- Cogstate (CGS) - Spec long term hold, favourable tail winds, cognitive decline monitoring, clinical trials, demographics, improving rev CF etc - long term CEO.
- COMMENT on validity of Q15 sharing financial information with partner, assumes everyone has a partner so those without a partner would have to answer No which may lead to a false result.
- Copper - aligned with industrial growth theme. If that isn't growing, the economy isn't doing well, and in that case I suspect other investment themes won't be doing that well either. It's an investment in progress.
- Core & Satellite approach to investing in shares. Use ETFs as well to compliment your portfolio
- Could look at SRL.
- CRN - Just announced a stunning set of quarterly results. At the end of June company will have returned more than US\$1B since the 2018 IPO to shareholders. Elevated coal prices forecast for the rest of the year as the EU and Japan has banned all coals from Russia from mid Aug. Long term a massive supply tightness in met coal.
- CSL
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- CSL a great Australian global well managed company in a market with high barriers to entry.
- CTM - Largest nickel deposit in the world not held by a major mining company. Pro-mining Brazil, available & skilled workforce (unlike WA mining companies), 15% tax for first 15 years, priority status given by Brazil govt, and in production EOY 2024.
- CXL - Calix is forward thinking with solutions to curbing carbon emissions, so demand for their products should increase.
- CXL – has been good.
- CXL - My best performing stock is CXL. Not sure if this is a good tip or not.
- CXL - Nice space, good tech.
- CXO
- Cyber Security will only continue to grow as our interactions increasing become digital and key long term field to invest.
- Cybersecurity is definitely under appreciated.
- CYC after they get (hopefully) the green light from the FDA to sell their superior imaging tech in the USA
- Data Centres theme. NXT. Not going anywhere. We are just consuming more and more data each and every day. Specific stock MAQ.
- Despite banks being unfashionable for perhaps the last 20 years and despite lots of naysayers predicting that the banks time is over, they are still the best investments I have ever made. CBA is currently 200% up on my purchase price and dropping a 15% dividend on purchase price.
- Despite the current ups and downs, I still like the Big 4 banks, particularly for dividends.
- DGL Group (DGL) - Founder led, recently floated with founder hold a large stack, traditional trading business with barriers to entry and expanding through takeovers.
- DHG and ZIP. But not for couple of months.
- Dicker data (DDR)
- Dicker Data (DDR)
- Digital Engineering is developing significantly and moving into more 3D modelling. I would recommend investing in this area for future growth. This may be dud advice.
- Diversify in value stocks that pay good dividends regularly. Risk – WBT.
- Diversify.

- DO NOT BUY and HOLD...
- Do not overtrade the "solids", e.g. the Top 20, but be active in the material sector and commodities.
- Don't ignore LICs.
- Don't buy Vulcan and Piedmont. Yes....its me!
- Don't hold TLS shares for the long term.
- Droneshield (DRO)
- Dubber (DUB)
- E33 - An oyster investment farm. Farmed up the NSW coast.
- Eat more meat, protein is important. (*This Member must be a farmer*)
- EcoGraf (EGR). Early days for the graphite producer which is also looking at adding value by processing graphite basic flake to a higher grade spherical graphite for Li-ion batteries. Processing plant in WA has received Govt grant from the Critical Minerals Fund. EGR is looking to provide an alternative supply chain to China. Graphite market growing as with the rest of the battery theme. \$230M market cap.
- ELD seems to be bulletproof lately.
- Elders (ELD) - Bill Gates is buying farmland - might be nothing.
- Electric vehicle theme is going to run longer as uptake of electric vehicles gathers pace.
- Electrification of everything as a solution to global warming.
- Employ the services of mature experienced brokers as necessary.
- EMV
- EMV - Great team with a proven track record, product hitting all the milestones, poised for success
- Environment where you can retire or downsize but still have contact with younger people yet still access health and service facilities.
- EOS - Going down fast at the moment - but it is only one of two Australian defence stocks - very specy.
- EOS - Smart innovations and monetised. Could be a take-over target. How much how fastened in what product categories is a bit hard to tell. Hard for them to disclose partners and customers in the military space. Appreciate a view.
- ESG and Resilience is a big/hot theme in the transport industry I work in and identifying a way to get into that theme. We are looking at investing money in making assets more resilient - this can translate to many things but a lot of money is being identified to address this issue.
- Essential Metals Limited (ESS). It is a Lithium stock and the only speculative stock I would buy but I believe it to have a good story and is undervalued. Have been in and out with a good profit and waiting for market sentiment to settle to buy again.
- Essential Minerals - ESS - explorer has high quality lithium deposits in WA.
- EV and battery components.
- Even after it jumped 200% last week I would have said GAL. Speculative miners and speculative medical are by far the best fun! (And my blind spot!)
- EVN - My brother works there - says there is a "shit load" (technical term) of gold underground.
- EVN - probably not at the moment but inside info suggests it is a very well run company - Red Lake should be a good future asset.
- EV's - Am I mad or is charging up lithium batteries too slow for anything but inner city runarounds? Hybrid technologies and ultimately green hydrogen energies is the future. Hydrogen is still a dot on the horizon but worth watching.
- EWCZ (NASDAQ) lots of potential 'growth' in this space.
- FDV
- Fertilisers.
- FID. Financial planning demand outstrips supply. Prices consumer pay is increasing.

- Find the dominant theme for the next 18 months before anything else. Actual theme, supported by evidence nothing else. Which sectors, then companies will benefit from it most. Ignore all others sectors. Debt will crush share prices of those that don't stand to benefit from the very first rate rise and onwards.
- FLT was at about 4500 before covid and will get back there in the near future. (*Not with all the extra shares it wont!*)
- FMG - Iron ore is their backbone of income but they are one of the only companies that will then have income to support and spend on Future industries to prepare them and give them a competitive advantage over their competitors.
- FMG and others for the green hydrogen future. Lithium will become relatively less important.
- Follow the asset allocation model of the Future Fund as closely as you can.
- Following the money - there is massive amount of money pouring into super funds. Many are cheap at the moment.
- Food and Agriculture will come out of this correction well. Companies like Elders (ELD), Ridley (RIC) and Graincorp (GNC) will do well.
- For 2022 though - Brickworks BKW and Macquarie MQG for stability, hopefully!
- Forget my survey answers, delve into this stock instead, it would be a lot more productive use of your time."
- Fortescue as they have a solid company and good dividend.
- FPH looks like a looming opportunity. Results on 25th.
- Funnily enough another sibling suggested Chalice Mining (CHN) which I'm following.
- Galileo (GAL). Very interesting prospects in Norseman and the Fraser Ranges. Mark Creasey has significant interest.
- Get rid of debt!!
- GMG - as logistics become more key in the post covid recovery, these guys are the best. Share price currently being hammered a lot more than the bond rate would imply.
- GMG - Warehouse infrastructure for online shopping. Who isn't purchasing more online?"
- GOOGLE for the imbedded software in our lives that drive big revenue"
- Gradually build positions in VAS and IVV. Individual stock tips even from professionals are for suckers. Watch Index Funds the movie on YouTube.
- Grange Resources (GRR)
- Graphite and the rare earths are dominated by China production and this must change soon, so miners of these products will have govt support and considerable upside short/ medium term.
- Green Hydrogen adoption becoming the new lithium play over this decade.
- Green mining stocks.
- Greenification - with all its ramifications -is a key theme for the years ahead
- GT1 / ALL / ESS / BPT / COB / BOE
- Ha Ha - This is exactly the type of advice I have learnt to avoid! Ha Ha...'inside information'
- Have a small list of beaten down quality stocks to buy when the market bottoms and sentiment changes.
- Have MQG as a core holding.
- Healthcare stocks to service a growing, older demographic. CSL is my ongoing tip.
- High hopes for AIS.
- Higher energy and food prices here to stay.
- HIO - 'Green steel' is the future and HIO has bucket loads of high grade iron ore that FMG only wishes they had.
- Hold 25% of your net worth in physical gold for your beneficiaries. No guaranteed value in equities!
- Hoping Brainchip (BRN) ends up a winner. Been too busy to participate (ie read) much lately.
- Horizon Oil. I think it is way underpriced.
- Hot Chili (HCH) - low grade but significant copper/gold resource that should eventually be highly sought.
- Hydrogen investment.
- I am a sheep. I follow the tips and the crowd which explains the big hole in my share portfolio. :(

- I am going with the EV theme, so I am heavily invested in lithium.
- I am happy with investments in LIC's like CDM and LSF where I buy at a discount and hope to do well in the years ahead.
- I am holding a small lithium explorer stock.
- I am hoping that Woomera Mining (WML) will have a significant discovery from one of their tenements.
- I am in the rural industry & although these stocks seem fairly volatile I don't think people realise how amazing the commodity prices are at the moment. When we have a wet season like this it is very unlikely it will turn dry again for a few years at least.
- I am increasingly steering away from Managed Funds - poor performance, lack of transparency, late and self-serving reporting.
- I am looking at the future resources needed for EV's, solar & wind turbines.
- I am not a big fan of tips.
- I am swayed to the energy sector, as I believe the energy crisis will become much worse. Oil supply is increasing at a decreasing rate and I don't see that changing, and at some point supply will decrease all together. This will all happen well before a sustainable replacement energy source is available. Obviously, there will be less of an energy crisis if demand drops away, such as in a recession.
- I believe that for the next 20 years nuclear energy will be the main source of energy in the world.
- I can't see how both carbon and data won't have tailwinds for the next 50 years. Just need to pick the right horses!
- I can't see how coal is not top of the pops for the next 2-3 years - no new mines, shortages, blah blah (thanks Vlad?) - any coal stock but I like WHC.
- I depend on MT to help me make investment decisions.
- I did a lot of research a few years ago into coal and as a result put a lot money into WHC and CRN. I still believe that there is more upside to these two.
- I do not consider my views as a valuable reference.
- I don't have a specific stock tip. That's why I am a subscriber to MT. Things aren't looking good as at 12 May 2022. Lithium? Hopefully things will get better.
- I don't have one.
- I got nothing.
- I got nuffin.
- I have a speculative stock LPD. Entry price 1.8c. Current price 2.7c. This is a chemical processing company, with exposure to Lithium Market. Would love Henry to take a look at it.
- I have had some good plays in the past but right now I don't have anything that is worth recommending
- I have my fingers crossed with Biotron (BIT). I've held it since 2003 and starting to feel that it be coming good :)
- I have never heard a bad word said about Macquarie Group, looking closely at Hyperion Global Growth at these levels.
- I have no inside knowledge but I can't help thinking PPK might be on to something. The share price has fallen hard but the number of applications (and resulting spin-offs) that their BNNT technology seems to open up sounds promising if they can pull it all together meaningfully.
- I keep my own council.
- I laugh when analysts claim interest rate rises hurt banks. I work in banking. We love interest rate rises! Anytime we have the opportunity to increase the margin spread on what we pay (deposits) and what we earn (loans) is great for our share price.
- I like Carnarvon as a future oil producer and very undervalued based on their oil reserves and potential takeover target by Santos.
- I like POS. Long term. Then again I felt the same way about AVH!
- I like tech software stocks but they are rare these days. SAAS obviously. May no longer be opportunities for these as they tend to be overvalued. XRO was the last notable opportunity. I sold my APT at \$130 and made

several hundred thousand but it was clearly a Ponzi scheme so I got out. XRO is not so I would suggest buy until another like it comes along.

- I like the commodity theme over the long term.
- I like TNE. Good management with skin in the game, grown profit every year since listing, very little debt, strong on R&D, and high ROE and ROC.
- I love AXE. If you have the stomach, that business will change the world. Also Calix - There is trillions of dollars to be made in saving the world. You can be a capitalist and do good.
- I never give tips as people always remember the bad ones!
- I really like the energy sector and specific a junior producer called Horizon Oil (HZN). Grossly undervalued based on low cost/high margin with very strong cash flow, no debt and excellent cash balance.
- I recommend to have at least two years cash.
- I still believe in green energy solutions such as nickel, lithium etc
- I think fertilizer (is not a load of crap!) will continue to be a big winner. I own (and losing heaps) on KLL and I also own (made good money on last uptick) on NRZ. Also IPL...I'm thinking of topping up in this downturn.
- I think that the decarbonisation theme is interesting and believe that uranium will play an important part of that whole transformation
- I think you need to look at Health or medical device stocks - especially with the baby boomer retirement & ageing populations around the world.
- I watch the big environmental themes looking for the next big disruption and I still watch for emerging SaaS businesses.
- I wish I did.
- I wish, but right now I haven't got a clue.
- I wish.
- I wish. Nothing I think is relevant. All driven by sentiment and algos. There's so many great stocks out there that just don't get a fair run
- I work in tourism and international travellers are back. I think people are underestimating the reopening trade.
- I'm interested in new technology but am unsure as to how to go about identifying this.
- IGO
- I'm hoping Vulcan VUL lives up to its promise.
- I'm in the IT industry - any company that is a first mover related to semiconductors and chips (WBT, BRN), AI (APX), data analytics (NEA, 3DP), data warehousing/consumption and has a SaaS model (recurring revenue) are good to follow.
- I'm interested to see how EV will play out over next 1-2 years, given Aust is rich in rare earths.
- I'm mostly out of the market and would only invest further in consumer staples at the moment. Resources look like they could be turning over and until we reach peak inflation then they might turn around.
- I'm not that smart.
- INR
- INR
- INR
- INR - As Henry has previously written about, it has too many ticks in the right places just need the buckwheat plan finalised and put to bed.
- INR - Maybe Biden can convince the US that lithium is a strategic resource. If so, this one should fly. Major theme ahead is "deglobalisation".
- Intermodal Shipping (shipping containers on trains) demand has increased exponentially during the pandemic and this is seen as something that will continue, firm I work with are privately held, other players may be worth looking at.
- Invest in Asia, growth for the future and undervalued now. Don't be afraid of China. Buy ETF ASIA.
- Invest in cybersecurity shares (Eg ETF - HACK)



- Invest in instalments regularly.
- Invest in Lithium
- Invest in the oil & gas sector and coal. The high inflation being experienced across the world is caused by high crude oil prices, high natural gas prices and high coal prices. Oil & gas is going to be more expensive because the root cause is a structural problem. Since 2014 most oil & gas majors have not spent the required capex on oil & gas exploration because of the demonisation of fossil fuels by climate change activists, politicians, financial institutions and some voters. This has resulted in not enough new proven oil & gas wells to come on line to replace existing depleted oil & gas wells so we are fast approaching a situation where supply cannot meet demand. This is not an easy fix and will take years. Politicians like to blame the Russia-Ukraine war, this is only one reason why prices are high but not the root cause. When the war is over the root cause still remains. In less than (6) months every driver will have to get used to paying \$3.00+ per litre of 91 petrol at every petrol station in every city across Australia. Politicians will never admit that because they are too busy chasing the net zero by 2050 dream to keep the climate change activists on side but the day is fast approaching when voters will be shouting loudly over high fuel prices and high electricity prices. Similarly for electricity, wind turbines and solar farms + batteries can never provide cheap, reliable 24/7 baseload power. Baseload power can only be provided by coal, gas, thermal, hydro or nuclear power stations, this is an engineering fact. All of Australia's current coal fired power stations can be refurbished quite quickly and be kept operational for many years (10+) while we go through all the political and legal hoops to obtain approval to build nuclear power stations - either large (4) unit power stations or small modular reactors which are available now.
- Invest in what is critical, not merely essential - themes, processes, materials - e.g. cybersecurity, logistics, graphite et al.
- Invest in what you can understand and see a market for.
- Investment in Iron Ore, New Age minerals mining and fertilisers have better future.
- Invictus Energy (IVZ). Compelling risk vs reward set up.
- Loneer (INR) - Lithium which has years to run but mainly because its USA based.
- Israel-based technology.
- It is important to understand (and act on) the market cycles.
- It is predictable but I reckon the EV/Lithium theme is just beginning.
- It's hard to beat the market so a few good ETF's are the way to go. I just wish I could take my own advice.
- IVZ - Off the radar but with big potential. Monster oil and gas prospect in Zimbabwe, drilling in July.
- JLG - Johns Lyng Group. Know the founder and former CEO. He is about to move to Colorado to drive the USA expansion. Watch him expand into a very fractured USA space.
- Just follow the EV/decarbonisation theme.
- Just spread your holdings across good long term stock through to medium term AND have a few "penny dreadfuls" with great future prospects. DON'T fall in love with any of them. I have 2 penny dreadfuls at the moment - AXE and NRZ.
- Kairos Minerals (KAI) - Prospective tenements adjacent to DEG, new management displacing lazy CEO. New management will accelerate resource upgrade to extract value for asset swap.
- Keep your family informed. Do not hide financial information (!)
- KPG - they have a distinctive growth plan and measure their progress against that plan. They also pay a monthly dividend.
- LIC - high customer satisfaction.
- LIC - see history of growth and this week's analysis from Goldman Sachs etc up to 100% growth after (stupid) 44% decline this year!
- LIC - Timing may be difficult but demand for their retirement homes will grow greatly in the next ten years. Don't hold now, sold when they were \$5.50! Bugger
- LIO - good management, already has revenue, getting into hydrogen, not a large number of shares on issue.
- Lithium

- Lithium
- Lithium - backed up by other EV materials
- Lithium - Because Henry said so.
- Lithium - preference for those mining now (PLS) or about to mine (AGY, CXO) as supply should increase in around 2 years leading to a decline in lithium pricing.
- Lithium and battery materials has a long way to run, it's not just the push for electric cars but also the use of green energy which has a massive requirement/reliance on batteries and if the nay sayers are correct in that the green system is not reliable, what are we all going to do? go out and put a great big battery of our own on the wall so we harvest our own energy and have continuity of supply.
- Lithium and rare earth stocks. Despite personal reservations on the utility of electric vehicles the momentum will carry these stocks higher in the medium term.
- Lithium as this will be used in so many ways in the future.
- Lithium can only grow in demand.
- Lithium stocks.
- Lithium stocks.
- Long term growth in technology and its impact e.g. Atlassian, Apple, Microsoft in ASX opportunities TNE, ALU, AD8 are potential global players.
- Long uranium.
- Looking at market today, I can recommend nothing!
- Looking at rare earths/lithium as the heat goes out of them due to the expected future demands for these stocks.
- LPI - a lithium play in Chile.
- LSF - I like their approach and that they have made money shorting overpriced high PE tech stocks in USA.
- LSF - well managed, directors invested heavily in it, makes profits both long and short trading.
- LSF is a good buy right now.
- LTR - Strong theme, long runway. Appears under appreciated by investors.
- LTR and SYA – Large Lithium Resources for future.
- LYC
- LYC
- LYC - China hold most rare metals. LYC will be increasingly important as Western countries avoid China having them over a barrel.
- LYC - Shortage of rare earths worldwide.
- Maas Group (MGH).
- Machine learning, robotics and electrification are the three most significant trends I can see today.
- Macquarie Group (MQG) for the long-haul. I liked Henry's reasoning about Transurban (TCL) as well - he notes inbuilt annual price rises.
- Make sure you are sitting on loads of cash for the next few years.
- Manage significant capital outside super. Look increasingly to reliable income stocks which also tend to hold their value. Resource stocks BHP and RIO are very good but are cyclical and have to be traded.
- MAY - They seem to have found something decent in Cuba based on the drilling results I saw.
- Melbana energy (MAY). significant on shore oil discoveries and potential
- Metcash-inflation hedge and decent dividend yield
- MFF Portfolio is now largely USA - a finance exposure with track record of consistent long term performance and CEO buying over past year has been continuous and substantial.
- MFG looks underpriced.
- MGT - I think it sits in a great position to go up in value
- MIN

- MIN - lithium, iron ore, and mining services. Plus Chris Ellison. Very volatile so you can trade the stock and make money.
- MIN (Mineral Resources) for the entrepreneurial qualities of Chris Ellison plus it passes my financial filters.
- Mining
- MLX - has run hard but now pulled back. Great future.
- MNB - If they pull it off it should make money and the price will at least double.
- MNY
- MNY - Money3. New product (acquisition) drives expanding sales through established verticals meaning it now has a larger market to tap (early evidence is proving this to be the case). Long lead times on new cars is keeping many shopping in the second-hand market. Funding in place (for a while). The only risk, does the economy slow to kill demand and balloon bad debts? The market is tipping it to be so, management unfazed. 9x earnings with an 8% Grossed up yield."
- MP1 - Megaport. They have been hit hard as have most tech stocks, however their change into a SAAS model and the fact that we will not be able to do without the cloud and internet of things will give them steady growth into the future. I look forward to topping up in the near future.
- MQG
- MQG - High quality in a volatile environment.
- MQG - Macquarie, a solid company as a core holding.
- MQG – Macquarie.
- MQG & FMG.
- MQG and PNI.
- MQG CXO IGO
- MQG has been my favourite... I just wished I did not sell it during pandemic times and was with Marcus to get my tips. Today I would be making 110%.
- MQG is a keeper. Buy in dips.
- MQG is my favorite Aussie stock, very smart people, excellent succession planning and superbly positioned for the multi decade energy transition. Another buying opportunity may present during the current downturn and following overly negative reaction to their recent great result. PS thanks for your great reports and congratulations on the quality of your team.
- MQG- scale in slowly
- MQG smart people very well run
- MQG. Don't sell it!
- MVP, for when the FDA gives approval. an alternative to opioid drugs in traumatic pain
- My old accountant said to me to buy all banks. I kept some of that thought for the dividends but in the last few years diversified and bought growth stocks and mining stocks.
- MYD
- NCM
- NCZ - making cash (at last), prospect of Cu mine in Tassie.
- Next generation semiconductors and artificial intelligence - WBT and BRN - Innovation will keep accelerating as can be seen with rapid evolution of PCs, smart-devices and internet. The redundancy of old tech to the best available solution demands these new technologies.
- Nickel - That's the key ingredient for long range batteries.
- NMT
- NMT - battery recycling will be huge in the future.
- NMT - I personally think the long term issue with old batteries from the huge growth in electric cars, which need to be replaced after 7 years is going to be a large issue in the future. I feel Neometals (NMT) is in a great position to capitalise on this especially in Europe.

- No I am a suburban vet so out of the financial markets loop, my advice/knowledge comes from MT, AFR & broker. Thanks to Marcus and Henry in particular for opening up and humanising investment with their personal and family anecdotes.
- No I'm afraid not. All of my possible tips are already out there.
- No specific tip but recently read that Wesfarmers is investing in lithium mines.
- No that is why I subscribe.
- No, as a retiree I'm a bit isolated which is why I rely on MT.
- No, that is why I need to subscribe to Marcus Today! I have no idea what I am doing.
- No. That's why I subscribe to Marcus Today
- None at this time - but I like MAD and SCP.
- Not a tip but I am following energy sector closely at the moment.
- Not a tip per se, and actually something I wished I'd invested in when reading about it in MT. The example showed a particular sector (farming/food I think it was) that had done well, recently, showing the individual shares that'd performed well (eg. ELD, NUF, IPL). I noticed one that had lagged behind (SHV), but which quickly caught up. So my tip (watch out for those insights from MT) and a request (keep them coming).
- Not at this time. It a time to probably be more observant than active.
- Not original but Lithium and Healthcare over the next 10+ years.
- Not really but I like the EV theme - seeing electric cars everywhere now
- Not really. That's why I subscribe to you!
- Not sure how to get exposure on the ASX to this one, but in Europe and North America the carbon trading business is only going to grow. Already significant in Europe. Looking for ways to get exposed to the facilitators of those carbon trades - software development companies and those with the industry knowledge to make the trading platforms a reality.
- Nothing surprising - precious metals/resources for future electrification - lithium etc.
- NRZ
- NXT
- Oil will continue to go up.
- On a side note, a huge Thanks for all the services the Team provides. The information is always well up there for bang for buck. Albeit at the moment its tough, but opportunities will soon abound. Just like buses, there is always another just around the corner!
- ORG
- PAR - addressing a significant need in society, in addition a huge addressable market
- PAR is on the verge of having approved their repurposing of a drug to treat late arthritis pain. It has already passed the FDA save to use Hurdle and just needs to prove its efficacy. There is a huge un-met demand. It is my possible life changing stock. The other is AD8.
- Part portfolio blue chip, part resources.
- Pay the extra and use an international share broker such as Morgan Stanley where you can buy shares in various jurisdictions and sell covered call options, puts and/or short sell, particularly in times such as we are experiencing now.
- PDN - "It's still early days, but we are seeing what we believe is an unprecedented geopolitical realignment occurring in the nuclear fuel cycle." Quoting Cameco CEO Tim Gitzel.
- PHB
- Pick up MQG when it dips! Other than that, only buy quality, low debt, dividend paying companies.
- Picks & shovels may not have the glamour but are generally better value especially within mega trends sectors.
- PLS
- PLS
- PLS
- PLS

- PLS - Large Lithium resource & in production.
- PLS - Late 2022 large producer with large margins and S2R - Did well to get lease next door Forestville gold mine - Kirkland Lake high quality tenure.
- PLS is way oversold - it's a well run company mining and refining Lithium which will be in big demand over the coming years.
- PLS still looks good.
- Polynovo (PNV) and Amplia (ATX) - overlooked biotechs with great science.
- POS - Poseidon is so drastically undervalued it is an issue in and of itself.
- Positive potential through growth of the middle class in a ""Commonwealth jurisdiction"
- Prefer MT teams and discussion group. Too busy being retired, don't know how I had time to go to work.
- Probably stating the obvious but the electrification of the world will move from a trickle to flood in the next 5 to 10 years.
- PTX - Biotech developing personalised therapies to treat cancer. Low market cap of \$100m when compared to similar companies.
- PWH - Sells to industries that will pay top dollar for a cooling solution.
- PWH - Years ago I had a cooling problem with a plane my wife and I built. I wish PWH had been around then and popped up on google search. As it was another Brisbane firm solved my problem (ARE Cooling)
- Raiz Invest – RZI - They continue to make strides as an organisation. Their foothold in South-East Asia is hugely overlooked. High rising middle class. Very bias.
- Rare earths.
- RCE
- RCE - Addressing a massive medical problem.
- Renewable energy generation is risky long-term.
- Resist the temptation to chase dividends. Capital reductions often outweigh dividends.
- Resource stocks.
- Resources and banks and you have the best of the ASX covered.
- Resources.
- Resources: they will drive Australia's prosperity.
- Retail will be difficult if rates rise, some will win even in this environment though.
- RHY
- RHY - CSIRO spinoff that has been well received by regulators and results compare favourably with current testing protocols. Who wouldn't prefer the diagnostic option of a blood test over a faecal test.
- RHY
- RHY - This is a blood test for bowel cancer screening which is more sensitive and accurate than the poo test. They are working now using this technology for other cancer screening including breast pancreatic cervical cancers. The potential market is huge, up to 1 billion people. The board has some very bright sparks in it from CSL Pfizer, Sonic the list goes on.
- Right now good companies like XRO have fallen out of favor - for a 3-5 year investment time frame seems a good time to buy.
- Rural land in a reliable rainfall area - has been a good investment over the 55 years I have owned it. Bought for \$100/Acre now worth \$6000/Acre
- Santos (STO).
- Speccies - LYN, SYR, NMT.
- Spread your portfolio into blue chip stock.
- SRL - Macro situation aside, I'm liking the look of some of the would-be mining companies in the critical minerals space that are awaiting financing. Feels like a wave of money is inbound to this space which presents an obvious re-rate catalyst. SRL as an example, ready to go, just needs to secure funding)"

- STA - Strandline Resources - A mineral sands miner, exposed to the ESG minerals theme, they have 20+ year life of mine, fully funded through to production. Also have additional growth options in Tanzania. In addition, the other theme, I'm following here is that they're transitioning from explorer to producer, they're now fully funded and have a very large and growing resource to mine. So the potential upside over the next 1 to 3 years, hopefully will be a sizeable upward re-rating of their share price.
- Stay invested in quality stocks. Don't trade.
- Stick with coal stocks.
- Stick with quality and growth at a reasonable price.
- Stick with the big Aussie - Hills (HIL).
- Stick with themes rather than individual stocks.
- Stocks like Xero and Wisetech which have recurring revenues. They have developed cloud software platforms which increase productivity and profitability for their customers that are difficult for customers to move away from.
- STX.
- Syrah (SYR) resources.
- Tech is still King.
- Tech stocks should be on the watch list when inflation peak.
- Telstra.
- Tesla and Nvidia.
- The acquisition of Vifor should accelerate CSL's share price. It takes it into new product territories which will supplement its two core competencies of plasma and vaccines.
- The Banks for dividends as rates rise.
- The 'beyond iron ore' mineral potential of the Pilbara - Gold, Copper, Lithium, Cobalt, the list goes on. Infrastructure largely in place.
- The current market conniptions are again presenting that opportunity, this time there is plenty of cash sitting on the sidelines.
- The decarbonisation theme will dictate the direction of the world for the next 20 years. Tech advances will go hand in hand with this narrative. Avoid all investments in fossil fuels for the sake of the planet (and your children).
- The energy revolution is not over by a long shot.
- The ETF "FOOD" - good growth over the past 2 years plus an investment "mega trend" that seems to have been lost in all the noise about batteries /EVs.
- The future is really here so keeping an ever focused eye over time on the major mega trends that are leading us forward.
- The green theme is going to be long and huge. You must have exposure if you want to do well in the future.
- The health industry be it from CSL to Nanosonics (NAN) the area will only continue to grow.
- The health sector. - increasing older population, more medical and treatment options available. A diversified exposure should best reward eg. CSL, COH, RMD, SHL
- The IPO's offered by Marketech have been good e.g NC1 is even now a 5 bagger and has been up to an 8 bagger.
- The lithium theme will continue to be huge over the next few years - PLS, LTR, AGY, AZL.
- The macro economic trends will play out as expected.
- The question did ask for a stock so for a more risky one I'm currently in AVZ, they have rights to a lot more ore than forms the basis for the DFS and going to be very green operation but a little risky given the location of DRC, and on the less risky side have some skin in PLS, already producing and mine located in Aus.
- The world needs to restrict greenhouse gases. Calix (CLX) are generating pertinent and real tech in this space. I've been in and out since Jan 21 - out at the moment...
- The world will always need resources. Invest for the long term in the big players.....invest for the short term in the hot sector.

- THEME - Exposure to India - maybe through Fidelity India Fund.
- Themes - Cybersecurity and defence.
- There are 17 rare earths. Keep an eye on production. Look into their impact on the environment.
- There are some big infrastructure spends promised that will re-rate the value of adjacent property over the next few years.
- There are some companies that appear to have a good eye to the future that I particularly like (eg FMG, MQG).
- think world going forward need cheap efficient energy, dirty word to most but uranium stocks for mine
- This is a tip that doesn't relate specifically to this question. Be very wary and avoid many of thematic ETFs. They are very volatile and you need to understand what you are signing up for - specifically what is in the box. For example, QUAL has performed worse than the generic SP500 IVV while most people would have expected the reverse. Why? IVV comprises 28% Tech while QUAL 39% Tech!!! Far better to stick with the generics IVV and NDQ with the only thematic I would/do invest in is SEMI (semi conductors - a theme Nick Griffin is strongly advocating). Rather than invest in ACDC I would just invest in the ASX producer lithium, RE & graphite stocks i.e. PLS, AKE, MIN, LYC, SYR.
- This is what I call a life changing stock, massive upside potential, very limited downside and very well managed with long term directors who have done it before.
- TLX – Telix - Health products for cancer getting market presence around the world.
- TNR - Torrian Gold prospector and rare earth in WA
- Top Australian resource companies seem to be looking after their shareholders now after decades of neglect and burning money.
- Topping up in an uptrend has higher success rate than in a downtrend.
- Trade the correlated shares in materials and energy
- Travel
- Tritium (DCFC.O listed on the NASDAQ). It is actively producing EV chargers and has recently teamed up with BP to install chargers in their outlets.
- TRJ has appeared to be honestly administered ever since floating, but being thinly traded, its price has tended to oscillate widely, producing opportunities for a patient investor to take profits, then buy back in later.
- TUL - Tulla Resources will re-rate when production starts in August.
- TVL - Sitting on \$67m of cash to invest in start ups (when start up cash is become harder to obtain). Has Afterpay & Block as mentors to provide leads for retail technology start-ups. Followed the tech sector down even though much cash still to be deployed.
- Uranium
- Uranium 92E, and AGE alligator energy, also like oil services sector.
- Uranium stocks, no real experience here, just a gut feeling that public opinion is changing in this regard.
- USA – ABNB - benefit from changing trend from COVID (permanent?).
- Vanadium stocks - vanadium redox batteries will replace large scale lithium ion batteries due to longevity and safety.
- VAS
- VGW, not listed on the ASX. Positive growth trajectory, strong profits and dividend, likely listing will unlock deep value.
- VML
- VML involved in critical minerals, cheap and now processing.
- VML the USA is going to want RE minerals closer to home.
- Vulcan was good and may well return to growth shortly.
- Wait for China to bottom then "put your house on it".
- WAM - (1) The price is generally stable keeping your capital safe (2) They have paid a 7% + franking dividend for the last 3 + years (3) They announce the dividend Ex date well in advance enabling you to use your capital to buy dividend stock twice in a results season. i.e. Sell WAM, buy stock, then sell & buy WAM back.

- We are on the brink of a mining boom when the world gets to panic with climate change, as Henry has identified. But there are massive traps - Lithium is flavour of the month but if something like an Aluminium ion battery gets perfected Lithium will crash. Copper, nickel, tin, rare earths etc a more surefire bet. I like Redflow (RFX) because it fills a niche, suitable for home batteries, bulky, safe cheap components \$ eventually we can bulletproof the grid when every household has one - where are the subsidies?
- We have followed Henry and have become lithium bulls. Prepared to wait it out 3-5 years
- We have set ourselves up with adequate income from a proportion of our portfolios (mainly in high yielding LICs which also provide diversification and pretty good resilience in a downturn) leaving the balance to be invested in more speculative areas. In that regard the new energy aligned metals have done particularly well and are expected to continue to do so. Eg. lithium, REEs & nickel etc.
- We will always need Energy. STO for now, Green Energy stocks for the future
- WES & MQG they have a track record of continually adapting to changes in their environment even though they have changed Chairmen, Board members, CEOs and industries they continue to perform.
- Wesfarmers at this price (WES)
- When it stops falling buy a significant amount (say 25% of investable funds) of IVV and park it for the future. You can have lots of fun with 75% of your portfolio but keep that 25% in the background as a basis for retirement.
- When the charts inform your decision invest in "battery stocks"
- When the market turns, INR, POS
- When you don't have time use a professional like Marcus and a good broker
- Wine is better for drinking than investing in.
- WKT - Walkabout Resources.
- WLE LSF - get rich slowly
- WOR - Australia does excellent mining, Worley supports the majority of the miners.
- WOR. The whole world is transitioning the way we create energy. The first industry that is required along that path is the engineering companies such as Worley who can plan, design and build these facilities. They've realised they can't rely solely on oil & gas and are boosting their new energy capabilities. Plenty of work to come their way.
- WTC - Tech seems oversold, and these guys have the systems that support global logistics.
- Xero is another one that is high quality and I think oversold."
- XRF Scientific
- XRO
- XRO - Go hard - especially in all this turbulence. high degree of recurring revenue and accounts love it. Is a user friendly labour saving device that is very sticky with its user base. UK MTD will be a boon for it in FY 23.
- Zillow

Regards



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