



TOP 5
COMPANIES
THAT WILL
BENEFIT FROM
APPLE
LAUNCH
THIS YEAR!

- Digital Report by Daniel Loh -





Disclaimer



- 1) Any stock investment carries risk
- 2) This digital report serve as an insight study into stock market and please treat it as an educational material
- 3) Investing in shares is up to individuals and our company are not liable for any losses suffered
- 4) If individual decides to invest, invest with the mentality if price goes down, be prepared to average down with 2% max loss per trade
- 5) Stock market should be treated as a relaxing and long term game



Apple 5G phone



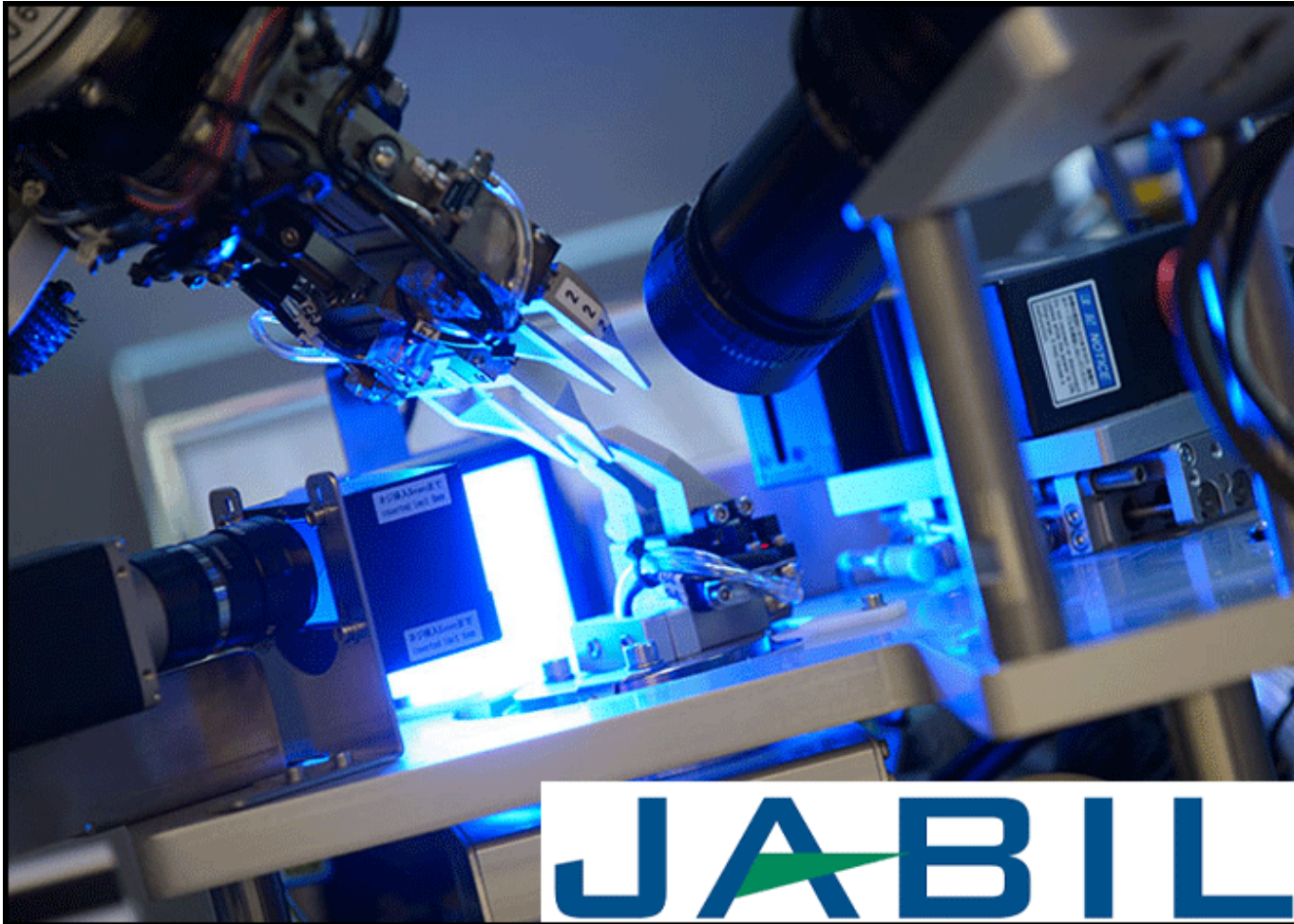
- 1) 5G speeds will be up to 100 times faster than 4G
- 2) The installed base for 5G is devices, most of which will be smartphones, is expected to increase by 14-fold between 2020 and 2023
- 3) Research firm Strategy Analytics estimates that Apple will become the undisputed 5G phone leader once it launches a 5G iPhone because this will spur a massive upgrade cycle for Apple's phones
- 4) Apple is forecasted to launch its 5G phone Sep this year



5 Companies to Benefit from Apple 5G phones



1) Jabil Circuit (JBL)





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Reasons

- 1) Jabil Circuit supplies phone casings for Apple
- 2) EPS Growth rate next 5 years is 12%
- 3) Based on its Growth, its Forward P/E ratio is 8.53 times, even less than Apple Forward P/E ratio of 19.3 times
- 4) Valuation of Jabil is much cheaper
- 5) Price got a hit because Corona Virus as most of its plants are in China, drop from \$44 to \$34
- 6) But we believe as manufacturing plants are back up, price is poised for a strong recovery because of 5G phones in September



2) Qualcomm (QCOM)





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Qualcomm Solves a Key 5G Problem for Phones

BY SASCHA SEGAN JULY 23, 2018, 8:30 P.M.

New millimeter wave antenna modules mean 5G phones are on track for early next year.



Qualcomm may have just announced a key component in next year's OnePlus 7: tiny antenna modules that fit new "millimeter wave" 5G frequencies into phones.

I'm mentioning the OnePlus 7 because OnePlus CEO Pete Lau **told me in Shanghai recently** that his company is committed to being in the first round of 5G phones.

The super-high-speed varieties of **5G** will rely on millimeter wave, a type of frequency that hasn't been used in mobile devices before because it's short range, doesn't penetrate walls well, and (until now) required complex antenna



2) Qualcomm (QCOM)





Reasons

- 1) Qualcomm is the world's leading wireless technology innovator and the driving force behind the development, launch, and expansion of 5G
- 2) Supply multiple electronic components to Apple, including Envelope Power Tracker, Baseband Processor, Power Management module and GSM/CDMA Receiver and Transceiver and modem
- 3) The whole company seems to be geared towards one goal – To Bring 5G to the World
- 4) Will be a dominant force in the 5G Industry



3) American Tower (AMT)





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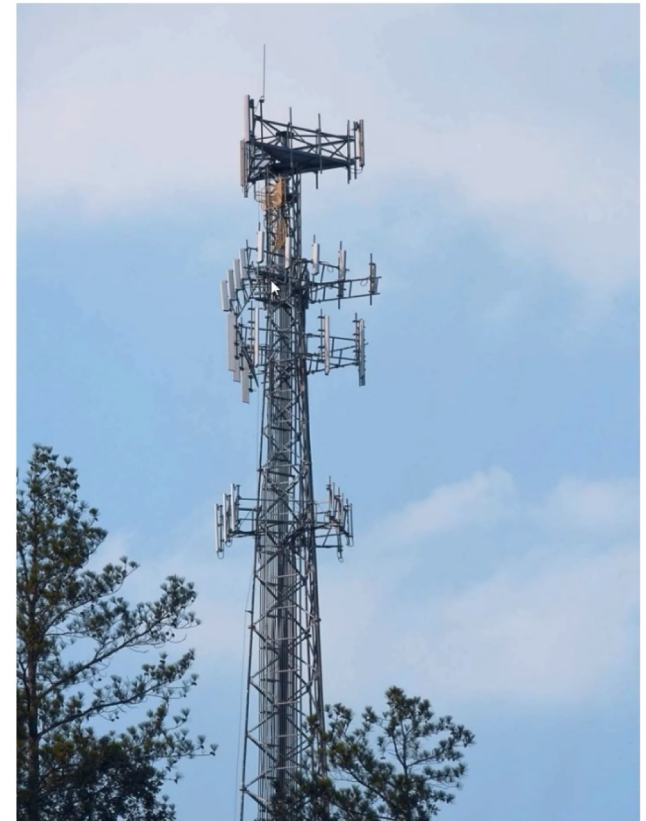
Wireless Tower Basics

What is a tower?

- › A vertical structure built on a parcel of land, designed to accommodate multiple tenants
- › Our tenants utilize many different technologies, including telephony, mobile data, broadcast television, machine to machine and radio
- › Tenants lease vertical space on the tower and portions of the land underneath for their equipment

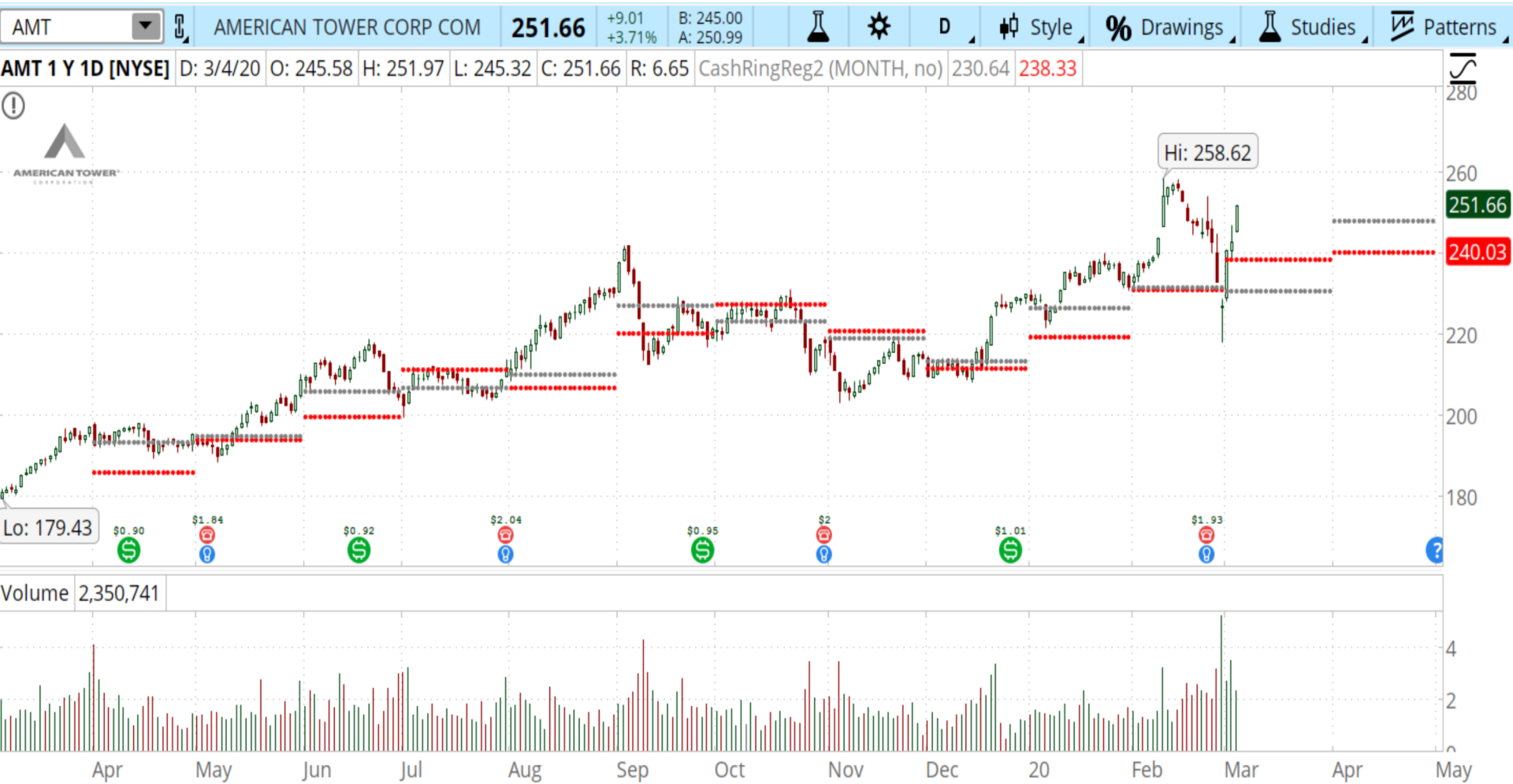
What is found at the tower site?

- › Tower company typically owns or leases under a long-term contract:
 - › Tower structure
 - › Ground interest (fee simple or lease)
- › Tenant typically owns and operates:
 - › Equipment, including antenna arrays, antennas, coaxial cables and base stations
 - › Equipment shelters





3) American Towers (AMT)





Reasons

- 1) American Towers is a US real estate investment trust (REITS) and an owner and operator of wireless and broadcast communications infrastructure in several countries worldwide
- 2) Leasing out space on cell towers is attractive because of modest construction costs, low maintenance costs, the non-cancellable nature of the leases, and decent leasing income.
- 3) The increasing adoption of 5G will result in increased data transmission and consumption, translating into sustained profit growth for the cell tower landlords
- 4) Reits is very resilient to sudden events like virus or trade war
- 5) Company dividend is increasing over the quarters
- 6) 98% of Customers who rent don't leave, unlike other Reits



4) AT&T (T)





4) AT&T (T)





Reasons

- 1) Cell phone carriers are expected to enjoy sustained enhanced profits from the introduction of 5G because customers will have to pay more for services
- 2) AT&T is the largest out of 4 Cell phone carriers in US
- 3) Focused on building networks that will enable fiber-based connectivity and LTE to work efficiently alongside 5G solutions
- 4) Recently announced that it has deployed 5G network across 22 additional cities in the United States, increasing fast.



5) Skyworks Solutions (SWKS)





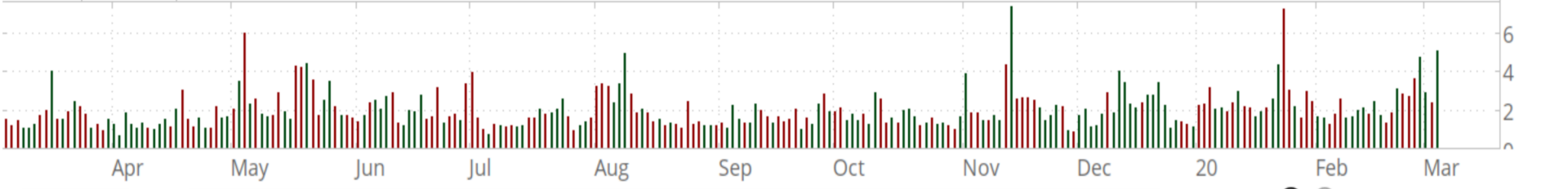
5) Skyworks Solutions (SWKS)

SWKS SKYWORKS SOLUTIONS INC COM 103.36 +3.73 +3.74% B: 102.01 A: 102.99

SWKS 1 Y 1D [NASDAQ] D: 3/4/20 O: 102.01 H: 103.37 L: 100.12 C: 103.36 R: 3.25 CashRingReg2 (MONTH, no) 102.84 108.16



Volume 5,037,873





Reasons

- 1) CEO Liam Griffin says in November's fourth-quarter earnings call. "We've been through 2G, 3G, 4G, we know how hard it is in 5G but it's a great opportunity. So... we're going to see an increasing level of revenue in 5G"
- 2) Company is focused this year on 5G technology revolution
- 3) Skyworks manufactures semiconductors for use in radio frequency (RF) and mobile communications systems
- 4) Like all Apple suppliers, share price was hit by virus slowing down production. But with 5G rollout this year, we expect going into 3rd quarter would be good



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