

# **TOP 5 STOCKS** THAT BENEFIT FROM COVID RECOVERY

~ 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) **Stop loss of 7%** of share price is suggested just in case we are wrong
- 6) Stock market should be treated as a relaxing and long term game, so **invest very small lots and diversification is the KEY to long term success!**



# 1) Kraft-Heinz (KHC)







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# Reasons

- 1) Share price plunge from \$98 to \$20 the lowest
- 2) Stock price has dropped Half-Half (75% from top), which I always think is cheap and is at a great pick up point now
- 3) Warren Buffett invested company, 26.8% ownership
- 4) This company doesn't seem to be affected by this virus as price is now above pre-virus days.
- 5) Company is talking about surging demand for its products amid the lockdown
- 6) Price to 2020 Earnings Ratio is 11.5 times, less than Peers who trade at 20 times P/E – Cheap valuation
- 7) High Dividend Yield of 6.1%

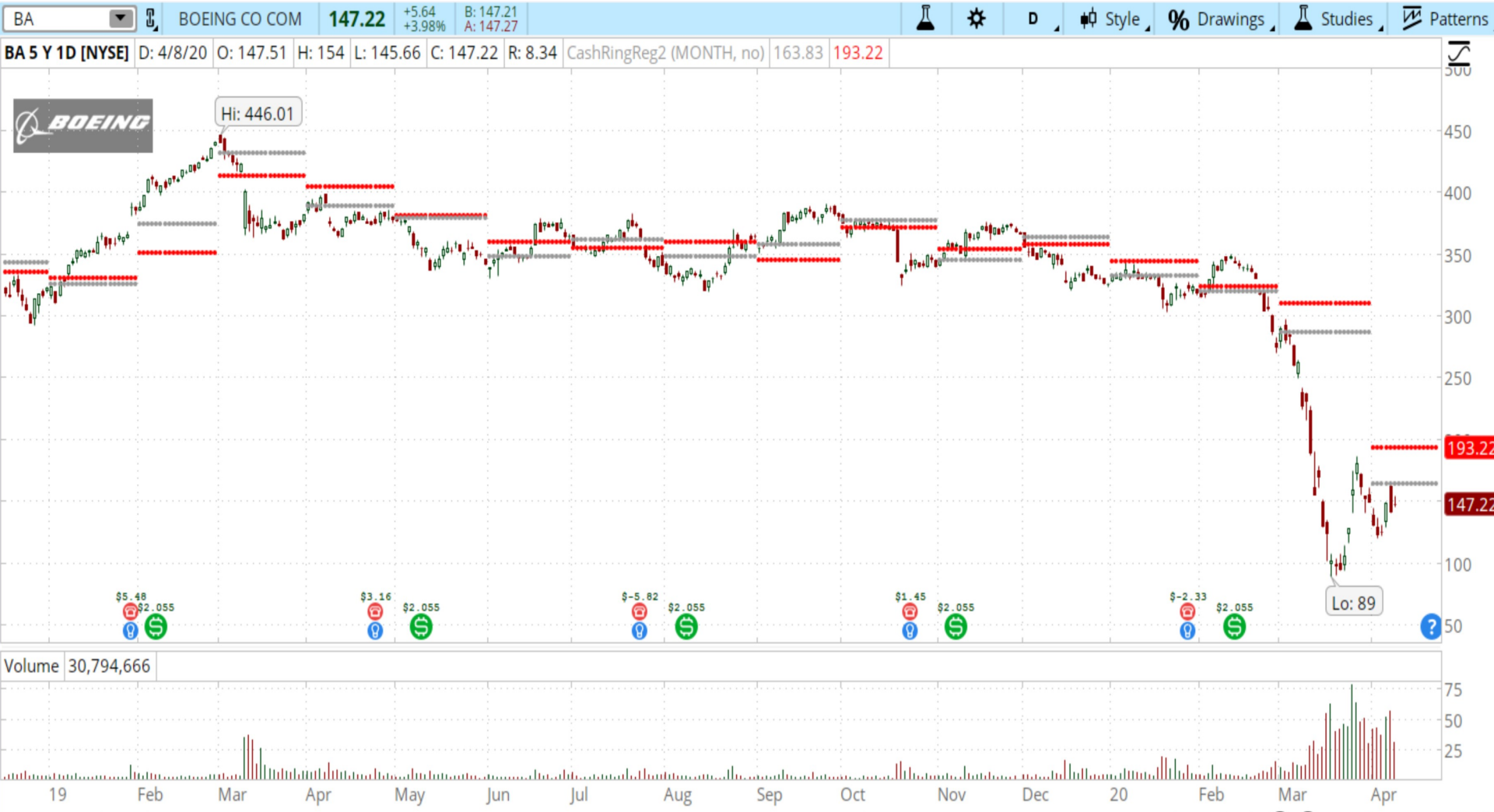


## 2) Boeing (BA)





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# Reasons

- 1) Share price plunge from \$446 to \$89 lowest, price at \$147 now
- 2) This is still the largest airplane builder in the world and together with Airbus, they formed a monopoly
- 3) For this stock to make a good comeback, wait for the world lockdown situation to get better as more countries release their lockdown. Good news that Wuhan has already done so.
- 4) Boeing is also the 2<sup>nd</sup> largest defence and weapons manufacturer in US, another sector it has monopoly
- 5) Boeing is one of the most affected company in this Covid19 episode, just like banks in Subprime crisis. It will take some years to recover. But if you want a stock that will be bailed out and is cheap now, this is the stock. Have a long term trading plan for this stock



### 3) Visa (V)





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# Reasons

- 1) Visa holds the lion's share of the U.S. credit card market by network purchase volume.
- 2) Between the height of the financial crisis in 2008 and 2018, Visa managed to increase its share of U.S. network purchase volume on credit cards by 11 percentage points to 53%.
- 3) When the U.S. economy recovers from Covid, Visa will benefit from this crisis
- 4) Every year grows by double digit figures
- 5) Will benefit from the \$1,200 coronavirus checks that hundreds of millions of Americans are set to receive and spend



## 4) ExxonMobil (XOM)





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# Reasons

- 1) We think there is a good chance that Crude oil price should recover to \$40 in one year time.
- 2) \$20 per barrel for oil won't be sustainable. There will be a cut in production at some point for Saudi and Russia
- 3) As Covid19 cases slow down and economy recovers, oil prices do have a chance to go back to the mean level of \$40.
- 4) Exxon Mobil is the largest oil and gas company in the world with strong balance sheet
- 5) Recently decreases Spending by 30%



## 5) Tesla (TSLA)





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# Reasons

- 1) Tesla is the fastest growing Brand in the world
- 2) Tesla is planning to restart idled production at its flagship California plant on May 4, China already restarted production
- 3) Analyst thinks Tesla dominance in Battery technology could grow into a supplier for other OEMs, a market that could be worth \$235 billion by 2030
- 4) Surveys conducted by a Wall Street firm is showing that the Tesla Model Y is trending higher than the Model 3 in terms of consumer interest, meaning it can generate more sales this year
- 5) Tesla has recently started to deliver Model Y cars in March



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