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3 Major Investment Themes Of 2019



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Markets

So, a guy walks into a bar...

It's amazing what happens when you talk loud enough in a bar setting, how your seemingly quiet conversation between you and your friends can spark intrigue and debate among the rest of the patrons.

Over the holidays, I meet up with a handful of clients who have become good friends over the years. We have good a chat about life, our families and what we think will be interesting in the new year. When we get to talking about investments, that's when the rest of the place always perks up. It happens every time. What's funny is that you would think we are debating over who was better... Joe Frazier or Dempsey (for the younger generations, these guys were boxing legends in the day when my father was growing up).

The punching bag in 2018 turned out not to be Trump but Wall Street. It was a bloody fight between the short-sellers and the Fed. But no one got knocked out and that's why we are bullish on the following three investment themes that make for a good conversation wherever you are:

1. 2019 will probably be the year of **Cannabis**.



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Medical marijuana may well be legalized in all 50 states and federally by the end of this year. Upon our last review, there were more than 30 public cannabis companies, mostly listed on the Toronto Stock Exchange (because cannabis is still illegal in the U.S.). If cannabis becomes federally legal in the U.S., many of those companies will implement a dual listing onto the NY Stock Exchange and become more easily investable – greater exposure – greater trading volumes – differentiation between the winners and the losers. Stock ideas in this trend include [Constellation Brands](#) STZ -0.45% due to their investment in Canopy Growth, Altria's investment in Cronos Group, and Acreage Holdings.

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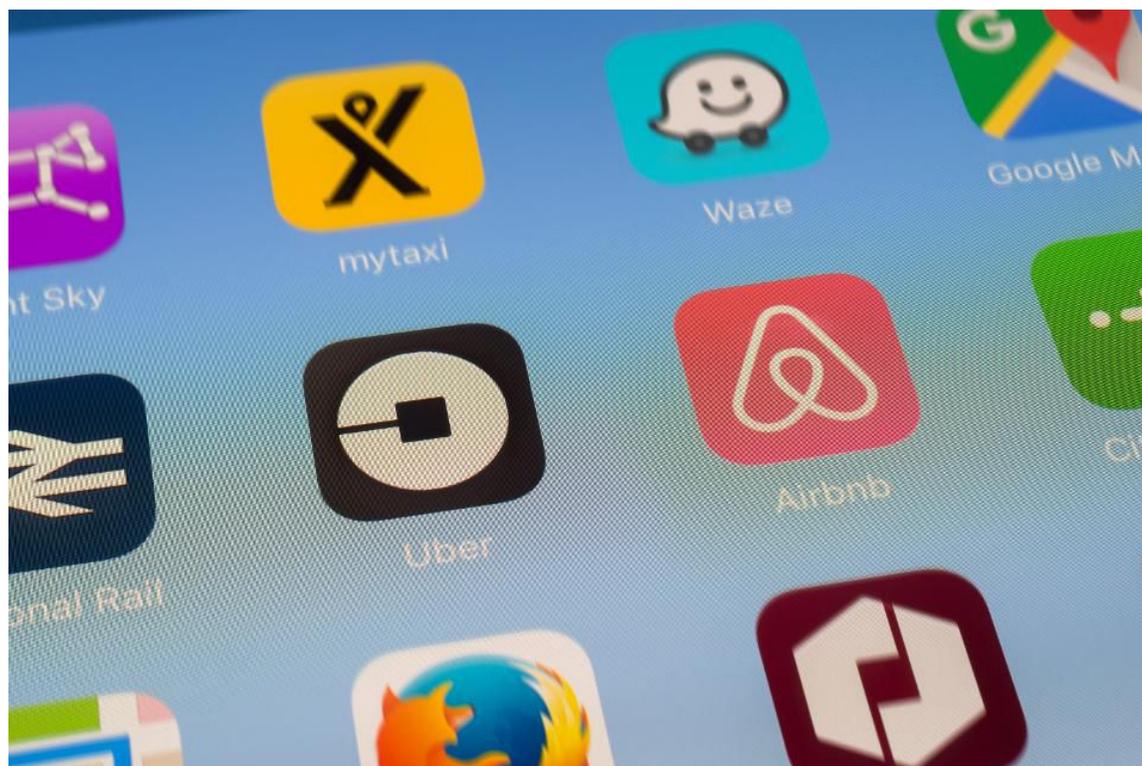
2. Five-G, or 5G telecommunications.



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5G is the next big wave and will require all your devices to go through an upgrade cycle to receive those signals. This will benefit all the chip makers and all the device makers from [Apple](#) AAPL -0.98% to internet TVs, e-readers like iPad and Kindle, even your desktop computers from [HP](#) HPQ -1.4%. This may benefit Verizon and hurt [Comcast](#) CMCSA -0.56%. 5G may benefit [Intel](#) INTC +0.78% (PC chip maker), and others. Even your car will need new hardware – perhaps you will have to buy a new one to receive 5G. Don't scoff. You will want the features that will become available given the strength and bandwidth available from 5G.

3. The Sharing Economy.



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The Sharing Economy is a trend that has been discussed but remains small compared to other major trends, but this trend continues to build momentum. Think in terms of [Uber](#) , Lime, Bird (electronic sharable bikes and scooters), Expedia, VRBO, etc. Millennials will share almost anything and will save money by not bothering to “own” a car, or home, or even a vacation home, etc. Some important public and pre-public companies in this trend include Uber, Lyft (not to mention foreign versions Careem in the Middle East and Yandex in Russia), Airbnb, and Booking.com (used to be Priceline).

So, the next time you walk into a bar, you just might walk out with three viable investment options.

Make sure to visit our [page](#) for game changing investment themed stock ideas.

Randy Warren serves as Chief Executive Officer at Warren Financial, a financial advisory firm originally founded in 1965 by his father. Today, under Mr. Warren’s leadership, the firm has greatly expanded beyond its headquarters outside of Philadelphia, with additional offic... MORE

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