

Rosenberg
ResearchEconomic Research
for Informed Investing

HOW TO INVEST IN THE POST-CRISIS “HOMEBODY” ECONOMY

For those with long investment horizons, I can tell you almost without a shadow of a doubt where the future demand growth is going to be. What the crisis has accentuated is this trend towards “cottage industries”, where working at, and being closer to, home is going to be a major investment theme (not to mention in high demand during this period when we have already become “homebodies”):

- Home-office technologies (cloud)
- Video streaming (home entertainment)
- Online retailers
- Health care services (bio tech and pharma)
- Utilities/residential REITs (fat yields and money-good)
- Semiconductors
- Delivery services
- Windmills, battery storage, solar panels on rooftops
- Hygiene producers
- 3D printing manufacturers
- Robotic technologies
- Telecommunications (with deep financial strength)
- Treasuries/municipals/A- and BBB- (high) rated corporate bonds
- Gold/precious metals
- Food supplies
- Consumer staples