



12 Stocks for The Robotics Revolution

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From the publishers of TradingWithCody.com
and [Scutify](http://Scutify.com)

Introduction

First, a note about Revolution Investing.

If you haven't been in the markets, but you're sick of getting 0% on your CDs, Treasuries, savings, checking, etc., while the markets have been continually hitting all-time highs this year, what should you do now?

First, step back and catch your breath before moving any money anywhere and make sure you're not about to make any emotional moves.

If you haven't yet read "Everything You Need to Know About Investing," (You can get it for free just by joining Scutify, the #1 financial social network and simply asking me for it on there), then spend a couple of hours doing so, please. It's a quick read, but chock full of important ideas, concepts and strategies that amateurs and pros alike should understand.

Then if you do decide you want to invest in some of the Wearables, Drones and Robotics Revolutions, you should consider slowly starting to scale into some of the ones you like best and/or the ones we have rated highest.

I wouldn't rush into a full position all at once in any of these stocks or any other position you'll ever buy. Patience and allowing the market and time to work to your advantage by buying in tranches is key. Maybe one-third or one-fifth of whatever you might consider to be a "full position" in any particular stock. And I wouldn't ever have more than 5%-15% of your portfolio in any one stock position at any given time. The younger you are and/or the higher the trajectory of your career income, the more concentrated and risky you can be with weighting in your portfolio. But spread your purchases and your risk out over time and over a several positions, no matter your age or risk-aversion level.

We're trying to find the most innovative companies in the most disruptive and revolutionary industries before the rest of Wall Street catches up to the trend. And more specifically, in today's markets with the Fed's endless money-printing and lending at 0%

rates to banks and all the other artificial help of QE, stimuli, targeted tax breaks for giant corporations, etc.

Some of our past successes have included getting into Google on its IPO day, Apple at \$7 a share, getting us positioned to profit in front of the ongoing bubble blowing bull market five years ago, loading up Facebook after it crashed post-IPO in 2012, and the booming App Revolution Bubble that is also still continuing.

But that doesn't mean we just blindly plow into the stocks in those Revolution Investing sectors. We have to be careful about who we're betting on individually, in addition to managing our portfolios with time, price and Fed ramifications.

One of the most depressing aspects of this ongoing bubble-blowing bull market is how retail investors are once again blindly plowing into what they think are Revolution Investing sectors, such as the current fuel-cell stock frenzy and the legalized marijuana penny stock frenzy. I've been loudly bashing many of the stocks in those sectors that are currently up 1,000% or more over the past few weeks as the frenzy has built up. I agree that fuel cells will someday be huge and profitable, but that's still probably a few years off before the technologies are truly competitive to the traditional gas and oil energy plays. And legalized marijuana is going to be Revolution Investing growth industries over the next decade or two.

And like I said that doesn't mean you just blindly go out and buy every stock you can find that says its going to be huge in those sectors. Much like I've spent and continue to spend endless amounts of time trying to make sure we're got the best and safest stocks in these Revolution Investing sectors like 3-D printing, each individual stock or fund you ever buy must be researched continuously.

It's easy to get lost in the back and forth of the near-term action of the markets. And I, for one, do think it's wise for even long-term investors to take some stock exposure off the table when markets are at all-time highs (as I was suggesting and doing myself back when the markets were at all-time highs a couple months ago).

But in the end, the key to long-term outperformance and making big money in the stock market is find and own the best and most revolutionary companies who are disrupting or

creating new marketplaces that will have huge growth ahead. Say, like Apple and Google were positioned to do back when the smartphone/tablet and search markets were just being created. Indeed, were you aware that as of this week, Apple and Google, respectively, are the two most valuable companies in the U. S.? That means, I've owned the two largest market-cap stocks in the U.S. for more than a decade, having first bought Apple at \$7 and Google the day it came public at \$95 in the open market after it started trading.

With this Revolution Investing approach, we're trying to find the next Apple and Google like I did the first Apple and Google.

The Robotics Revolution

When you're looking at long-term, revolutionary-type investments, you're obviously trying to find markets and companies that are growing quickly and with huge potential in front of them.

There are two types of growth, secular and cyclical. Cyclical growth happens when a company and/or a market see upside along with the broader economic cycle. Energy companies, metals markets, chemicals, housing and many commodities fall into this type of category. That is, when times are good, so too will their businesses likely be good and when times are bad, all the boats sink together.

Secular growth, on the other hand, happens when a nascent industry is taking off, about to grow into revolutionary proportions as it displaces old business models and technologies. Two factors contribute to an industry's secular growth: Entirely new demand is created and demand from other industries is taken. Netflix, YouTube and other web/app video sites, for example, are contributing to more people consuming more video than ever before. But people are also spending some of the time that they used to spend watching network and cable television on Netflix and YouTube. That's a double shot of growth for the web/app video industry.

Likewise, wearables, robots and drones are going to be secularly-growing, eventually reaching new revolutionary proportions, creating new end-markets, consumption habits and prosperity for our economy as well as our society at large.

How many wearable computing devices do you own right now? None, is the most likely answer. How many times a day do you interact with a drone right now? Unless you're in Afghanistan, Syria or somewhere like that being targeted by the Republican/Democrat regime or a [hobbyist with a quadcopter camera](#), your answer is most likely, never.

And robots? Factories are filled with robots, but our day to day consumer doesn't interact with robots much just yet.

Meanwhile, over the next five to 10 years, billions of new wearable gadgets in hundreds of new form factors with millions of new applications will be sold to consumers and enterprises around the world. Drones — from Google's and other's driverless cars to pilotless aircraft to quadcopter package delivery — will be everywhere in our daily lives within the next decade too. Facebook and Google will be using Drones to deliver Internet access. Robots, which, if they're fully mobile, would also be known as drones, are going to sell us routine tickets, provide safety checks and who knows what else over the next decade.

The wearable/drone/robot revolutions get even better for investors who are willing to do their homework because each and every one of those wearables, drones and robots needs ever more computing power and sensors.

The first iteration of the iPhones and Android smartphones had about three sensors each, including accelerometer, proximity and light sensors. Today's smartphones and tablets have 10 to 15 sensors each, including the three already mentioned along with 3- or 6-axis gyroscopes, fingerprint, gesture and even heart-rate sensors.

Each wearable, drone and robot will likewise have 10 times or more as many sensors as these early versions of wearables, drones and robots that we see coming out today.

So if you can find a market that will grow from almost nothing currently to selling billions of units a year in the next decade, you're probably onto some good investments. But if you can find component plays in that industry that will sell 10 or 20 or 100 components into each one of those units, you're probably onto the kind of investment that Intel was when PCs were nascent and before it went up 1,000-fold from 1970s to the 1990s.

Drones, driverless cars and other unmanned, sensor- and software-controlled vehicles are so much safer and cost efficient than human-driven vehicles that the disruption of all routine deliveries and shuttling is inevitable over the next five to 10 years. Robots that patrol, report, track, and otherwise provide real-life services are also inevitable for the same reasons: They're safer and more cost efficient than human patrols and trackers.

Robots are about to hit the mainstream consumer. “Jibo acts as a helper and a partner in a variety of household experiences, much like a physical embodiment of Siri. Now, or any of the voice-activated concierge services available on our phones or tablets.”

The smartphone, tablet, and other gadgets are getting even more functional and capable than the old personal computer ever did. Keyboards will increasingly seem antiquated in coming years as we move towards voice recognition and gesture recognition technologies.

Voice recognition and interaction with our gadgets and is everywhere. I saw my mother-in-law using Google Translate on her iPhone to translate her words into Spanish so the lady helping take care of her 96-year old father can understand her better when they get confused with each.

Voice interaction with our gadgets will indeed continue to grow exponentially. Nuance is the purest play on this, but I lost faith in management's ability to execute and create shareholder value a long time ago. Microsoft, Google and Apple are all investing billions in voice interaction and there's no doubt that we'll all be talking to our devices just like Captain Kirk used to do on the Starship Enterprise.

Likewise, in another decade or so, we'll see gesture and movement interaction with our technologies becoming ever more mainstream. Just like Captain Picard used to be able to go into a "holodeck" room that could simulate any environment and/or historical scenario on his starship Enterprise, so too will we be actually simulating the actual movements of players and feeling the contact from the tackles when we play Madden 50 in another 25 years.

Don't believe me? Look back at EA Sports' first Madden game and compare it to Madden 25 which came out last year. [Madden History Evolution of Madden \(1989-2013\)](#)

People will also find that being able to gesture to their devices to get interaction with them will often be much more convenient than actually talking to the devices all the time. Simple tasks like turning the volume up or down when you're watching a movie on your gadget that's projecting a live holographic video feed from Shanghai of Superbowl

LXXVI (in the year 2031) into your living room will be easier than asking it to turn the volume down while you're talking to your grandkid. A few weeks ago, Apple bought the company that supplies the Xbox Kinect with its gesture recognition technology.

So without any further ado, let's jump in and look at 12 of the best positioned stocks to invest in the Robotics Revolution.

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Motorola Solutions Inc- MSI

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Price: \$67.41 (Market cap \$16.80B)

Net cash per share: \$12.36

2014 Revenue: \$8.52 Billion

Revolution Investing revenue growth rate estimates for next three years: 2-10%

2014 Earnings per share (consensus): \$3.90

Revolution Investing EPS estimates for the next three years:: \$3.63, \$3.97, \$4.33

Another huge semiconductor conglomerate that will benefit from all the new wearables, drones and robots that will be hitting the markets and need to be wired up over the next ten to fifteen years.

Motorola has thousands of patents focused on mission-critical and wireless technologies and their standard mobile, computing, RFID, WLAN products.

The company has had years of little to no topline growth and needs penetration in these new WRD Revolutions if the stock is ever going to give shareholders some decent upside long-term.

Revolution Investing Rating: 5/10

ABB Ltd (ADR)- ABB

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Price: \$23.02

Net cash per share: \$3.16

2014 Revenue: \$41.60 Billion

Revolution Investing revenue growth rate estimates for next three years: 10-20%

2014 Earnings per share (consensus): \$1.16

Revolution Investing EPS estimates for the next three years: \$1.25, \$1.55, \$1.85

This industrial global conglomerate from Switzerland is one of the biggest providers of switchgears, circuit breakers, capacitors, surge arresters, cable accessories, high voltage components, reclosers, fuses, contactors, relays, sensors...and many, many other components that will be required for every robot and drone and many wearables over the next ten years. Sensors are going to be one of the very biggest growth submarkets within the robots and drones markets, as sensing gravity, objects, heat, location and other inputs is a part of what makes all this future and these wearables, drones and robots revolutions work.

Revolution Investing Rating: 7/10

TE Connectivity Ltd- TEL

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Price: \$64.01 (Market cap \$25.83B)

Net cash per share: \$3.50

2014 Revenue: \$13.64 Billion

Revolution Investing revenue growth rate estimates for next three years: 15-20%

2014 Earnings per share (consensus): \$3.43

Revolution Investing EPS estimates for the next three years:: \$3.79, \$4.21, \$4.62

TE Connectivity is one of the largest chip companies you've never heard of. Their connectivity and other chipsets sell billions of dollars of units annually into the Automotive, Broadband Connectivity, Consumer, Energy and Industrial markets.

The company's technological road map theoretically focuses on ever smarter, safer, greener and more connected chips. With ever lighter and smaller components, enabling more features, capabilities and intelligence to be built into next-generation electronic devices, like our wearables, drones and robots, as well as already having huge traction in large existing markets, there's some good potential upside for TEC's shareholders.

Revolution Investing Rating: 7/10

Citrix Systems, Inc.- CTXS

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Price: \$63.54 (Market cap \$10.39B)

Net cash per share: \$5.06

2014 Revenue: \$3.0 Billion

Revolution Investing revenue growth rate estimates for next three years: 12-17%

2014 Earnings per share (consensus): \$1.78

Revolution Investing EPS estimates for the next three years:: \$3.09, \$3.64, \$4.09

Citrix is a leader in mobile workspaces, providing virtualization, mobility management, networking and cloud services to enable new ways to work better. Think of how all those wearables, drones and robots will need a master console control unit somewhere. You'll control those robots and drones and wearables with your smartphone via apps or by your PC via a centralized website on the Internet. That's what Citrix already focuses on and if they can successfully position themselves as the de facto standard platform for controlling these things, the stock has ten-fold upside. Big if, though, as other software competition and open-sourced standards will obviously have a big place at the WRD Revolutions table. Citrix solutions power business mobility through secure, personal workspaces that provide people with instant access to apps, desktops, data and communications on any device, over any network and cloud.

Revolution Investing Rating: 7/10

Symantec Corporation- SYMC

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Price: \$23.04 (Market cap \$15.56B)

Net cash per share: \$5.90

2014 Revenue: \$6.68 Billion

Revolution Investing revenue growth rate estimates for next three years: 7-10%

2014 Earnings per share (consensus): \$1.28

Revolution Investing EPS estimates for the next three years:: \$1.88, \$2.03, \$2.18

Unfortunately, there's a lot of nefarious threats to privacy and even control of the actual devices as the WRD Revolutions build. Anybody who's ever seen 24 Live Another Day, knows the horrible threat that faces any nation whose drones were hijacked over the networks. Viruses and data theft are also going to be ever bigger issues as these wearables, drones and robots get ever more sophisticated and their abilities grow.

Symantec's the purest play on fighting these downside realities of the WRD Revolutions. The revenue growth has been tepid for the last few years despite the opportunity that the company should have been able to better capture in smartphones, tablets and apps. Investors and analysts have lost faith in the company's ability to get back into high growth mode and I can't say I blame them. The company's core businesses – consumer, endpoint security, storage management and backup – should give them the ability to easily become standard protection in the WRD products of tomorrow. The onus is on management. I'm not convinced they can pull it off.

Revolution Investing Rating: 6/10

FireEye Inc- FEYE

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Price: \$38.95 (Market cap \$4.97B)

Net cash per share: \$4.03

2014 Revenue: \$161.6 million

Revolution Investing revenue growth rate estimates for next three years: 20-50%

2014 Earnings per share (consensus): \$-2.60

Revolution Investing EPS estimates for the next three years:: \$-1.79, \$??, \$Y

FireEye has invented a purpose-built, virtual machine-based security platform that provides real-time threat protection to enterprises and governments worldwide against the next generation of cyber attacks. These highly sophisticated cyber attacks easily circumvent traditional signature-based defenses, such as next-generation firewalls, IPS, anti-virus, and gateways. The FireEye Threat Prevention Platform provides real-time, dynamic threat protection without the use of signatures to protect an organization across the primary threat vectors, including Web, email, and files and across the different stages of an attack life cycle. The core of the FireEye platform is a virtual execution engine, complemented by dynamic threat intelligence, to identify and block cyber attacks in real time. FireEye has over 1,100 customers across more than 40 countries, including over 100 of the Fortune 500.

Revolution Investing Rating: 7/10



Part III. Original Equipment Manufacturers

iRobot Corporation- IRBT

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Price: \$37.83 (Market cap \$1.10B)

Net cash per share: \$6.29

2014 Revenue: \$487.4 million

Revolution Investing revenue growth rate estimates for next three years: 20-30%

2014 Earnings per share (consensus): \$0.83

Revolution Investing EPS estimates for the next three years:: \$1.11, \$1.42, \$1.75

With a name like iRobot, this company sure better be a pure play on the Robotics Revolution. And iRobot indeed is. I can't say I think iRobot's sweepers and other household robots are very compelling or good values, but the company's entire business is building and selling many of the kinds of robots we are talking about here in this report. The stock's not cheap, as it trades at nearly 20x our 2016 Revolution Investing EPS estimates and I don't find the growth rate compelling enough to want to own it. Robotic vacuum cleaners that don't work very well aren't exactly what I call "Revolutionary."

There is another side to iRobot. iRobot's defense and security robots perform multiple missions for troops and public safety professionals. More than 5,000 robots have been delivered to military and civil defense forces worldwide. Developed for the U.S. Army's modernization program, Small Unmanned Ground Vehicle (SUGV) is the robot for dismounted mobile operations and infantry missions. SUGV's predecessor, the iRobot PackBot[®], is one of the most successful battle-tested robots in the world, performing thousands of dangerous search, reconnaissance and bomb-disposal missions.

Revolution Investing Rating: 5/10

Textron Inc.- TXT

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Price: \$37.32 (Market cap \$10.71B)

Net cash per share: \$2.44

2014 Revenue: \$12.10 Billion

Revolution Investing revenue growth rate estimates for next three years: 20-40%

2014 Earnings per share (consensus): \$1.64

Revolution Investing EPS estimates for the next three years:: \$2.07, \$2.64, \$3.28

Textron is a very old company that specializes in aircraft, defense and industrial products. Textron's biggest brands are Cessna, Bell, and Textron Systems. The Cessna segment manufactures business aircrafts and services. The Bell segment manufactures and supplies military and commercial helicopters, tiltrotor aircraft, and related spare parts and services. The Textron Systems segment produces unmanned aircraft systems; armored vehicles, turrets and related subsystems, and marine craft; smart weapons, and airborne and ground-based sensors and surveillance systems, and protection systems; test equipment and electronic warfare test, and training solutions; piston aircraft engines; and intelligence software solutions.

Textron has little to no presence in the consumer world and I don't expect that to change any time soon. But many of the Textron Systems drones, robots and other military products are about to go mainstream into many law enforcement and domestic surveillance applications.

Revolution Investing Rating: 6/10

Adept Technology Inc- ADEP

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Price: \$9.53 (Market cap \$118.64M)

Net cash per share: \$.51

2014 Revenue: \$56.97 Million

Revolution Investing revenue growth rate estimates for next three years:60-100 %

2014 Earnings per share (consensus): \$-0.05

Revolution Investing EPS estimates for the next three years:: \$-0.01, \$.25, \$.40

Founded in 1983, Adept Technology is the largest U.S.-based manufacturer of industrial robots. Adept intelligent automation product lines include industrial robots, configurable linear modules, machine controllers for robot mechanisms and other flexible automation equipment, machine vision, and systems and applications software.

You name the industrial robot market and Adept is a player in it. Robotics are going mainstream though, and the question for Adept is whether or not it can leverage its industrial presence into these new markets. Adept security robots patrolling your apartment complex? That's what will drive upside for this stock. Not sure it's in the company's wherewithall or vision to pull it off though.

Revolution Investing Rating: 5/10

Intuitive Surgical, Inc.- ISRG

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Price: \$384.48 (Market cap \$14.71B)

Net cash per share: \$40.60

2014 Revenue: \$2.12 Billion

Revolution Investing revenue growth rate estimates for next three years: 20-25%

2014 Earnings per share (consensus): \$13.32

Revolution Investing EPS estimates for the next three years: \$11.90, \$14.85, \$17.96

For the last fifteen years, Intuitive Surgical's da Vinci Surgical System has been shocking skeptics as its become an accepted form and often preferred method of getting surgeons doing more surgeries in more places than ever thought possible. Intuitive Surgical is now by far the global leader in the rapidly emerging field of robotic-assisted minimally invasive surgery. All that superior visualization, enhanced dexterity, greater precision and ergonomic comfort for the robotic surgery demands a plethora of high-end components, chipsets, and software. The da Vinci System enables surgeons to perform even complex procedures such as open-heart surgery and so much more. This is one of the best ways to invest in the long-term technological revolutions that will change health care over our lifetimes.

Revolution Investing Rating: 8/10

Mazor Robotics Ltd - ADR- MZOR

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Price: \$14.78 (Market cap \$311.06M)

Net cash per share: \$2.97

2014 Revenue: \$20.0 million

Revolution Investing revenue growth rate estimates for next three years: 20-25%

2014 Earnings per share (consensus): \$-0.70

Revolution Investing EPS estimates for the next three years:: \$-0.37, \$-0.29, \$-0.18

Mazor could be considered the poor man's Intuitive Surgical. That is Mazor Robotics is a leading "innovator in spine surgery. Their idea is to somehow transform spine surgery from freehand procedures to "highly-accurate, state-of-the-art procedures that raise the standard of care with better clinical outcomes".

I'm not a big fan of this company's and the hype that seems to ooze from their press and investment materials, but if the company's products do eventually catch traction, you know that things like "minimally-invasive spinal stabilization procedure enabled by Renaissance, an intraoperative 3D imaging system that is an add-on to C-arms (operating room imaging systems), and expanding clinical applications such as cranial procedures, i.e., cranial biopsies and deep brain stimulation implant placements" are going to have a whole slew camera modules and other input and sensor components.

Revolution Investing Rating: 4/10

Honda Motor Co Ltd (ADR)- HMC

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[Price](#) / [Balance Sheet](#) / [Cash Flow Statement](#) / [Income Statement](#)

Price: \$35.41 (Market cap \$63.48B)

Net cash per share: \$6.55

2014 Revenue: \$115.94 Billion

Revolution Investing revenue growth rate estimates for next three years: 10-20%

2014 Earnings per share (consensus): \$3.12

Revolution Investing EPS estimates for the next three years:: \$3.65, \$4.01, \$4.33

ASIMO is probably the world's coolest robot as of 2014. ASIMO can run, walk on uneven slopes and surfaces, turn smoothly, climb stairs, and reach for and grasp objects. ASIMO can also comprehend and respond to simple voice commands. ASIMO has the ability to recognize the face of a select group of individuals. Using its camera eyes, ASIMO can map its environment and register stationary objects. ASIMO can also avoid moving obstacles as it moves through its environment.

Honda's been researching and developing robot technologies for more than twenty years and if they can ever get one of these to market that actually provides some sort of real service, such as patrolling apartment complexes or serving coffee at an airport terminal or something like that, they'll see some huge revenue and earnings potential finally realized.

More recently, Honda has created the CHP Drone Squad, a vehicle-based-system designed to work efficiently and seamlessly in the harsh environment of California highways of the year 2025 on existing highways and streets. They've also got their new Moto-Drones division which focuses on delivering un-manned motorcycles capable of being rigged for multiple response or rescue missions. In ten to fifteen years, can't you picture buying a Honda Moto-Drone touring cycle to ferry you across the US in a modern day "Zen and the Art of Motorcycle Maintenance" kind of way?

Revolution Investing Rating: 7/10

The Robo-Dex Robotics Stock Index

Go to [#RoboDex on Scutify.com](#) to see the latest charts and performance numbers of the Robo-Dex Wearables Stock Index.

ROBO-DEX \$12,227

Edit | Rename \$130 (1.1%)

ROBO-DEX Holdings: \$11,507 Today: \$115 • 1.0%

ANALYTICS 1w 1m 3m 1y YTD

Performance vs benchmarks

■ You ■ DJIA ■ S&P 500

+7.1% +7.2% +14.1%

Account value over time

Gainers

■ ADEP ■ TXT ■ FSL

Portfolio Breakdown

Gains	+\$801.49
Deposits	\$0.00
Dividends	\$0.00
Interest	\$0.00
Fees	\$0.00
Other	\$0.00
Total	+\$801.49

Portfolio Stats & Ratios

Stat	Value
P/E	22.3
P/B	2.8
ROA	6.5%
ROE	11.9%
PEG	0.1
EV/EBITDA	7.8
Beta	1.2
Dividend Yield	0.9%

Ticker	\$ Basis / Share	Price	Change \$ • %	Total Gain (%)
IRBT iRobot Corpo...	36.00	34.72	0.58 • 1.7%	-3.56%
TXT Textron Inc.	39.00	38.26	0.69 • 0.0%	-1.90%
HMC Honda Motor ...	35.00	34.30	0.39 • 0.0%	-2.00%
MZOR MAZOR ROBOTI...	15.00	13.60	-0.02 • -0.1%	-9.33%
ADEP Adept Techno...	8.50	9.57	0.14 • 0.0%	12.59%
ABB ABB Ltd.	23.00	22.58	0.13 • 0.0%	-1.83%
TEL TE Connectiv...	64.00	61.76	0.61 • 1.0%	-3.50%
CTXS Citrix Syste...	63.00	69.30	0.69 • 1.0%	10.00%
SYMC Symantec Cor...	23.00	24.32	0.20 • 0.8%	5.74%
FEYE FIREEYE INC	36.00	31.54	0.84 • 2.7%	-12.39%
MSI Motorola Sol...	65.00	62.11	0.47 • 0.8%	-4.45%
ISRG Intuitive Su...	384.00	452.89	1.36 • 0.3%	17.94%

* mutual funds quotes as of previous day

Cody Willard is the chairman of [Scutify](#), writes [The Cody Word](#) and [Revolution Investing](#) for the WSJ's MarketWatch and posts the trades from his personal account at [TradingWithCody.com](#). At time of publication, Cody was net long some of the stocks mentioned in this report.

Lucy Bottrell is the editor-in-chief of [Scutify](#). At the time of publication, Lucy was net long some of the stocks mentioned in this report.