Presenting his first budget as President of the United States, Donald Trump made it clear: Fossil fuel is back in favor. Renewable, alternative-energy sources will have to fend for themselves. In turn, his budget significantly boosts spending for the National Nuclear Security Administration.

Feign surprise. Trump’s $1.1 trillion budget proposal slashes just about any spending program that doesn’t have “military” or “homeland security” in its name or mission statement. He boosts spending in those arenas to support the war-mongering urgency that was a rallying cry for his America first campaign.

Alternative-energy was not spared. His budget proposes some staggering cuts to a handful of new-energy programs. Solar, renewable and other alternative-energy research, grant and loan programs would be gutted if Trump’s proposals stand. It cripples, if not kills, one clean-energy program after another.

The Advanced Research Projects Agency-Energy is a target. This program supports early development of new-energy technology not yet supported by the private sector. Funding slashed.

The Title 17 Innovative Technology Loan Guarantee Program also is on Trump’s hit list. This initiative makes it possible for companies to invest in energy technology by guaranteeing the loans. Funding slashed.

Trump’s budget is essentially a blustery anti-climate change statement. It sends a clear message in contrast to much of the developed world.
But Trump’s march against clean energy will fall short. And it will create a wave of profit opportunities in the alternative energy space.

Why? First, Congress still needs to approve Trump’s budget. This is a lengthy process, and Trump’s proposal will look nothing like what he turned into Congress once it’s final.

Second, the alternative energy revolution is sweeping the globe. It knows no geographic, economic, cultural or social boundaries. This trend far surpasses what’s happening in the U.S.

And technology, not natural resources, is shaping the future of energy. From the Bering Sea to sub-Saharan Africa, from Sweden to Costa Rica, countries big and small are exploring, inventing and creating new energy technologies.

The global economy is going green, despite Trump’s hacking of the budget.

Investors and entrepreneurs who recognize this reality early will reap the greatest rewards. Ray Blanco will show you the perfect way to play this trend later on.

Going Green Goes Global

Just this past fall, a report by the World Energy Council concluded world energy demand will peak before 2030.

The council, 3,000 public and private organizations from 90 countries, cited four “disruptive trends” that will level demand within a dozen years. They are slower population growth; government policies to curb carbon emissions; new technologies in energy conservation and production; and a shift in high-growth markets from developed to developing countries. That’s where solar and other renewable options will predominate.

The study urged government and industry leaders to reassess energy strategies and investments.

It said they should develop policies that “decarbonize” energy supply chains. It also recommended exploiting the disruption of the energy economy to reduce costs and diversify suppliers.

This report is one among many that emphasize the benefits of, and the business case for, acting sooner rather than later to leave the fossil fuel economy behind.

Fossil fuel dependency may linger for years. But no political force — not even President Trump — can reverse the direction energy production is taking.

Alternative energy sources will soon become the norm, not the up-and-coming exception.

**Goodbye Fossil Fuel, Hello Alternative Energy Profits**

It wasn’t long ago that the United States’ political elite justified, in part, the spilling of American blood in the Middle East. It said it wanted to protect the flow of oil to Western shores.

It was all about oil. It was about inventing in the public’s collective eye mile-long lines of vehicles waiting to pump gas at $5-plus a gallon.

We don’t hear that fear talk anymore. Only about 10% of oil is imported from the Persian Gulf to the United States. The fabricated fear that skyrocketing oil prices could wreak economic havoc has evaporated.
I have been forecasting it for years: Oversupply drove oil's dramatic decline in price.

Oil, like other commodities, products and goods, was being produced at rates and volumes unsustainable in a sustained stagnant economy. Whether it's toys, clothing, oil, copper or you name it, there is more of it than people can buy.

But as oil supply outpaced demand, an unprecedented diversity of energy sources and players entered the global market. That reflected the underlying long-term trend of the world's shift away from fossil fuels.

In 2014, I forecast new fuel sources as “Dominant Energy” as a top trend for 2015. Since then, energy markets have been marked by innovations that improve the value of traditional fuels as those fuels are supplanted by improved renewable and new alternative-energy technologies.

In making that forecast, I predicted that “fossil fuels are going to be the alternative energy at some point.”

The dramatic drop in oil pricing is shaping a robust, diverse playing field for energy. That's due as much to low demand as to new fuel options.

From hydrogen-powered cars to clean coal technology, I forecast our thinking about energy would turn the corner. It did.

When I made that prediction, it was unthinkable to visualize a global geopolitical landscape absent the Western world's dependency on Middle East oil.

But that's not only thinkable. It is reality today.

Energy prices for fossil fuels declined as advancements in new-energy technology rapidly accelerated. Go back 100 years ago. Coal was the dominant energy. Then, oil became dominant. Before that, people rode around on horses and buggies.

What we're looking at is that kind of change.

Trump's energy-budget priorities aside, the global trend toward embracing new energy resources is unstoppable.

Trump may make it easier for automobile manufacturers, coal producers, nuclear and traditional energy industries to do business. However, investment in alternative-energy technology continues to rev up around the world.

China, for example, just announced a $360 billion investment in renewable-energy technology. By some analyses, China will soon be positioned to be a world leader in this area. It would sell its technology to other countries, further lessening global dependency on fossil fuels.

Sweden, Costa Rica, Germany, Denmark and India are among nations accelerating the rate of investment in developing innovative energy sources. They are outpacing the United States.

The pace is creating an enormous global marketplace. Political policies aside, the race for cheaper, cleaner energy will continue to accelerate. Nations becoming more self-sustaining and less reliant on energy sources from other countries is a powerful trend.

In 2015, I forecast “self-sustainability” as major trend for 2016. I predicted the great globalization trend would peak. Populism would rise. Countries worldwide would begin to rely on their natural resources. And technological advances would become less reliant on other nations.

Energy independence is a major current of the self-sustainability trend.

**Alternative Energy: Good For Business, Good For Investors**

It may not be universally politically accepted. But it is increasingly good business.

In America, states with strong green-energy industries are more attractive to major employers. That's per a new report called *Corporate Clean Energy Procurement Index: State Leadership & Rankings*.

The study was commissioned by the Virginia-based Retail Industry Leaders Association and the Information Technology Industry Council in Washington, D.C. The idea was to rank the 50 states according to the ease with which major corporations could secure domestically produced renewable energy.

More and more companies are committing to renewable energy. They are being pushed by regulation, consumer preference and their own sustainability goals. These companies are attracted to states where green power is ready and plentiful. Those factors can reduce prices. States with limited energy options tend to have higher energy costs.

The United States solar energy industry employs more people than either the coal or natural gas industries, according to a Solar Foundation study. That's not coincidental.

The British government recently confirmed plans to spend £730 million annually to boost renewable energy projects. The priorities will be wind and wave power. The U.K.’s business and energy secretary cited the move as Britain bids to become an inviting home for green-energy businesses and technologies.
At the same time, the government confirmed plans to phase out conventional coal-fired electricity generation by 2025.

Consumers, power producers and forward-looking governments are forging broader alliances. They will steadily curtail, and ultimately end, the use of fossil fuels.

Later this year, California will start making electricity from its roads.

The state is pilot-testing piezoelectric sensors, which turn mechanical pressure or stress into power. The sensors are about the size of a dime. They will be embedded in road surfaces and wired together. Sensors will generate power as vehicles press on and vibrate the road. It's estimated that a 1.5-mile stretch of a busy highway could generate enough electricity to power 1,100 homes.

Other states are watching California's venture. If it proves successful, more states will follow suit. The demand for piezoelectric technology will soar. Piezo power will begin to be adapted for other uses. Sidewalks could be next.

The grander scale is clear. Fossil fuels already are suffering low prices from oversupply and falling demand. Each new alternative-energy development will cut deeper into the oil, gas and coal industries' profits.

The Netherlands is looking to ban the sale of new gasoline-powered vehicles by 2025. The proposal has passed the parliament's lower house. It is likely to be approved by the upper chamber. Norway considered a similar measure. It rejected it in favor of exploring incentives to lure drivers toward electric transport.

For now, the Netherlands' action is largely symbolic. All-electric cars remain pricier than gas guzzlers. Tax breaks and other government incentives are still necessary to bring electric vehicles into the average household's price range.

While Trump's energies appear refocused on traditional gas-powered vehicles, the technology behind electric vehicles is now surging.

Colorado's transportation department has partnered with a private developer to test a highway that charges electric trucks wirelessly while they're moving.

The project will bury an electric transmission system under a stretch of highway. The system will beam power to electric engines in trucks that travel in this special “charging lane.”

Aecom, the private partner, helped create the technology with the Sustainable Electrified Transportation Research Center at Utah State University. The center figured out how to beam electric power to buses parked on a grid. Aecom persuaded it to expand research to devise how to power vehicles on the fly.

Colorado's test patch will begin construction in 2018. Meanwhile, Aecom is looking for a few cities that might want to try the system as well.

Changing the Future of Energy For Huge Gain Potential

Groundbreaking forms of energy technology are emerging from small teams and research labs.

Researcher Randell Mills has been quietly preparing to end the fossil fuel age for more than two decades.

He says he's ready.

On Oct. 26, 2016, he gathered his scientists, engineers and manufacturing partners at his lab in a suburban smear of industrial and office buildings outside Princeton, New Jersey. They revealed the latest version of his technology. They shared plans for its commercialization, beginning this year. The audience was a select group of colleagues, investors and potential customers.

He calls his device the SunCell. He claims it yields the power of a thousand suns in a small device. The SunCell uses no exotic or rare elements. It consumes only purified water. It does not emit noxious waste or greenhouse gases.

The result: Electricity generated at a cost of less than a tenth of a cent per kilowatt-hour. That's hundreds of times
cheaper than most oil, coal or renewable electricity sources.

The SunCell has no moving parts. Its projected life is at least 20 years without major maintenance.

Even more exotic, the device will run on water pulled from the atmosphere. Once the energy-yielding reaction has begun, it can sustain indefinitely.

Science fiction?

Much technology emerging today, after a generation or more of study and development, was labeled science fiction in its earliest development.

But the SunCell is another example of research underway that marks a surging departure from fossil fuels. It's a trend I have been closely analyzing for more than two decades.

In my 1997 book, *Trends 2000*, I wrote:

The energy revolution will be the single biggest investment opportunity of the 21st century. Its ramifications will extend to practically every aspect of human and planetary life. To profit from this trend, potential investors should begin familiarizing themselves with the field thoroughly and immediately, and keep abreast of developments before they become official.

But even if breakthroughs in energy technology work, Exxon Mobil won't close up shop anytime soon. It likely will take decades to dismantle the fossil fuel economy.

Also, the oil and coal industries’ lobbyists and hired politicians will scramble to find legal and regulatory ways to protect their patrons’ interests.

The Trumps of the political world can continue to leverage fossil fuel industries to gain political points among those industries. They can't, however, top the tidal wave of new-energy technology upon us.

Again, I saw this trend coming in *Trends 2000*:

By the middle of the 21st century, the oil industry would be as dead as the whale oil industry…

The chain of ancillary industries, products and services that depend on or sustain the fossil fuel and nuclear energy industries will go down with them — mining, drilling, refining, processing, delivering, storage, equipment.

The trend toward alternative energies will accelerate a fossil fuel-free future. It will steadily devalue investments in coal and petroleum assets.

As more institutions, businesses and countries divest from carbon energy, profit margins will further shrink. So will exploration initiatives to drill and mine for fossil fuels.

This opens up huge profit opportunity. If you’ve never invested in alternative energy, now is a great time. Ray Blanco has the perfect place for you to start…

Until next time,

Gerald Celente

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**Cash in on Sunlight with this Solar Energy Operator**

Donald Trump may not be keen on alternative energy, but as Gerald explained, the industry’s tail wind is too strong for him to stop.

Trump has no intention of holding back “old energy” like coal and oil. He's reducing regulation to encourage more American energy jobs.

However, alternative energy is also turning into an engine for job growth — and a large part of Trump's electoral platform was based on the promise of job creation.

At the same time, there's practically no chance Trump is going to subsidize solar or wind like his predecessor did.

The change in attitude at the Oval Office is actually going to be beneficial for the solar industry.

As subsidies phase out, it means alternative energy companies are going to have to compete freely with conventional sources — and with each other.
This competition is key. We are going to see better technology that will give us higher efficiency and lower cost. Without big government moving in to pick the winners and losers, the players are going to have to compete on what really counts: having the best product at the lowest price.

That means that Trump’s policies will create a healthier, more normal market for alternative sources like solar. Paradoxically, that just might be what the solar industry needs to pick up growth speed.

Instead of being about “saving the Earth,” the solar industry will become more about turning profits and improving technology.

That technology just keeps getting better. In many emerging markets, it’s already become cheaper than conventional sources.¹

Yes, many of these countries have to import energy — which is expensive. The U.S. may be the world’s second-largest energy consumer, but it’s one with huge energy resources. That’s cheaper energy for us.

That also means that solar innovators will have to work harder to become competitive here. It’s happening. Already, solar is becoming competitive in several of our Sun Belt states — and that’s without accounting for a subsidy.

But there’s little doubt that they will. Solar energy is caught in the midst of a technological virtuous cycle, one that reminds me of Moore’s law.

As you know, Moore’s law has acted as a sort of self-fulfilling prophecy in the semiconductor industry. Ever since the Intel founder described the phenomenon back in the 1960s, it’s held solid.

Like the tick-tocking of a clock, the electronic elements on our computer chips get smaller — meaning more powerful and cheaper computing.

Richard Swanson, the founder of SunPower, noticed that the price of solar panels drops 20% every time industrial capacity doubles. He is credited for noticing this trend, much like Moore gets the credit in noticing a regular trend in semiconductor chips.

Swanson noticed that as solar manufacturing capacity ramps up, there is increased competition and price drops. And with increasing innovation, the efficiency of the solar cells increases. The trend has held true for decades at this point and, with new technologies being explored and deployed, will continue to do so in the future.

Despite the improving technology, the solar panel industry in the U.S. has been in a shaky period. The competition has become cutthroat among solar panel manufacturers. There’s been a huge amount of supply on the market. That’s been tough for companies like Swanson’s SunPower.

But what’s a loss for a manufacturer is a gain for consumers. Lower prices make solar energy cheaper to deploy for utility operators — and more profitable, too.

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But what's a loss for a manufacturer is a gain for consumers. Lower prices make solar energy cheaper to deploy for utility operators — and more profitable, too.
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¹ See the graph for further details.
As I pointed out, the alternative energy trend is now well established. The sun's shining bright on the future of alternative energy technologies like solar and wind. Now here's how we profit.

**8point3 Energy Partners LP (NASDAQ: CAFD)** was founded as a joint venture between two big American solar panel companies: SunPower and First Solar.

8point3 is what's known as a yieldco: “a company that is formed to own operating assets that produce predictable cash flow, primarily through long-term contracts.”

In the case of 8point3, those operating assets are solar energy-generation projects.

When 8point3’s founding sponsors finish a solar-generation project, they can either operate it themselves or sell it to 8point3 for cash and flip it into a new project. 8point3 has the right of first offer to these projects.

Since 8point3 doesn’t sell or install solar equipment, it isn’t as dependent on government subsidies for these activities. The company acquires high-quality solar assets developed by its sponsors and sells that power to utility, commercial, industrial and retail customers.

The company operates over 642 megawatts of capacity in the United States. Installations can be large, like the 108-megawatt Quinto Project, in Merced County, California, or small, like the three megawatts generated on the roofs of Macy's department stores in California.

The company pays a high and rising dividend. As I write this, the company has declared an increase, raising the forward yield to a lofty 8.15%.

Furthermore, SunPower and First Solar’s project pipelines have the long-term potential to keep feeding 8point3 increasing capacity — and therefore, the opportunity to grow cash flow to fuel continued dividend yield growth.

CAFD currently trades for $13 per share and has a market cap of just under $1 billion.

**RECOMMENDATION:**
Buy 8point3 Energy Partners LP (NASDAQ: CAFD) up to $15 per share.

To a bright future,

Ray Blanco

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**Sources:**
## Technology Profits Confidential Open Positions

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<tr>
<th>COMPANY</th>
<th>SYMBOL</th>
<th>BUY DATE</th>
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**Note:** Returns are based on recommended entry and exit prices as mentioned in the Technology Profits Confidential e-mail alerts. Brokers’ fees are not taken into consideration when calculating returns. If you are not receiving the Technology Profits Confidential e-mail alerts, please send us an e-mail to TEK@agorafinancial.com. All numbers are believed to be correct. **Prices as of 4/3/17.**

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