

GEORGE  GILDER'S  
MOONSHOTS

**WEALTH  
FROM THE  
INTERNET  
REBOOT**



# GEORGE GILDER'S MOONSHOTS

## Wealth From the Internet Reboot



By George Gilder

In order to predict a future technology trend before anyone else, it's critical to maintain a real edge over other investors — one that is almost impossible to replicate.

And my edge comes down to two primary factors.

First, I can call just about anyone in the tech space and not only have them take my call, but have them invite me inside their companies.

Those are the kinds of doors that will open after making so many accurate calls as regards burgeoning tech.

The other factor is what I like to call “Paradigm Points.”

Essentially, these are the rare moments when a new technology mega trend is about to reach explosive levels of growth.

For instance, in my earlier days I predicted the Microcosm, or the rise of the microchip.

I actually handed former President Reagan his first microchip and told him it would change the world.

Then I predicted the Telecosm — the technologies that would rise to replace the television.

Here's what I said in 1994 in my book *Life After Television...* and in many speeches before then:

*“The computer of the future will be as portable as your watch and*

*as personal as your wallet. It will recognize speech and navigate streets, collect your mail and your news.”*

We all know what happened more than a decade later...

I hate to take credit for the iPhone, but Steve Jobs later read the book and passed it around to friends. So it's safe to say I at least planted the seed.

As you can imagine, identifying these Paradigm Points is what helps me get ahead of the money and make the biggest fortunes.

And now I'm seeing a new Point forming.

It's a technology revolution that's taking place *right now*. And its massive growth potential threatens to dwarf the rise of the personal computer, smartphones, and social media.

It's easily going to change how we travel, how we bank, how we buy things, and more. Wealth created in the next few years by the companies powering this prophecy will be stronger and longer-lasting than at any other point in history.

I'm talking about the Cryptocosm.

## **The Next Paradigm Point Has Hit**

Now, when people hear “crypto” they usually think of bitcoin. And indeed, the Bitcoin blockchain was one of the first big Cryptocosm projects, and it was developed 10 years ago.

But the Cryptocosm isn't just about cryptocurrencies.

The Cryptocosm refers to this amazing, providential, effervescence of creativity that's erupted all around the world...

All to supply a new architecture for the internet, and indeed, ultimately a new architecture for the entire world economy.

I know what you might be thinking. Why do we need a new internet architecture?

For starters, the current internet infrastructure was built for a simple purpose: sharing information.

The information superhighway was launched by academics to allow researchers on various projects around the world to collaborate.

But as you know, the internet is now used for much more than sharing ideas.

We send money. We log in into bank accounts. We enter our social security numbers. We make video conference calls with colleagues.

Clearly these new tasks require an upgrade.

Yet the infrastructure of the internet hasn't been upgraded since its inception.

We all know the result: a cybersecurity nightmare.

There were a *billion* breaches on the internet last year. A billion breaches of private data.

A big reason this happens? Centralized security...

Google, Amazon, Facebook, and eBay — all the big tech companies have created walled gardens for their own commercial domains. There they could accommodate commerce among their mostly locked-in users.

All secured with an individual login and password.

The big problem? This actually solved the biggest issue that hackers face. Choosing certain information to safeguard actually tells them exactly what's important, and where it is, putting the entire internet at risk.

That's like storing your nest egg in a giant safe with a blinking sign... in your front yard.

This is the fundamental vulnerability of all centralized security and classification systems that are associated with it.

The Cryptocosm will change all of this.

Your information will no longer be centralized and vulnerable. It will distribute all personal information all across the entire network, just as human intelligence is distributed across the world.

This is my big message for all readers: Our current internet architecture, with no security and with millions of usernames and passwords, is going to give way to the Cryptocosm.

Ultimately, when the Cryptocosm is established — and the new internet framework is in place — there will be a real fix to make the internet secure.

It will create the proper foundation for what the internet's really become — a huge commercial database to connect transactions all over the world. But this time around, with complete security.

And this is all going to change sooner than you think, thanks to a new technology that's creating an explosion of possibilities for advancement.

## **The Blockchain Will Drive the Cryptocosm Forward**

Blockchain technology, at its very essence, is a public key and a private key.

Today, we have keys in the form of combinations of usernames, passwords and other security data for every distinct website we visit.

Well, the blockchain reduces everything to one private key and its public complement, and you don't change it.

Just like you have a singular key to get inside the front door of your house, this blockchain key will be your singular key to unlock the entire world of the internet...

That key represents you in the Cryptocosm.

In other words, the blockchain solves both the security problem and the privacy problem of the current internet.

But that's just one way blockchain will help propel the Cryptocosm forward.

It also opens up all your online payments to make them more secure.

This will change the way we bank... It will make online shopping much easier, with no passwords to remember... Way more opaque, with almost zero hacks.

It changes everything, really.

It will bring about a reboot of the entire internet that we've been waiting on for nearly 20 years.

But that leaves the question...

If the Cryptocosm is the Paradigm Point, and blockchain is the primary driver of the trend...

How are we going to invest in the expansion of this emerging and exciting space?

For that, we identify companies with true vision...

## **Pinpointing Truly Innovative Companies**

Yogi Berra once said, "If you don't know where you're going, you'll end up someplace else."

This applies in many ways to the expansion of the Cryptocosm — especially in regards to the blockchain.

If you've followed blockchain's emergence, you might think that we are a little early in the hype cycle for this technology to be investable.

That's understandable. We seem to find ourselves perpetually navigating the inflated expectations of one so-called "disruptive technology" after another.

But remember this: We've also entered an unprecedented age of creative convergence — or what Joseph Schumpeter called "creative destruction." That is, where innovation is accelerating as the technologies themselves.

In other words, we're about to see a radical compression of the hype cycle.

## **Moonshot Investing: 3 Simple Steps to Pinpoint Explosive Opportunities**

### **STEP 1: IDENTIFY NEW “PARADIGM POINT”**

I begin by zeroing in on exactly when an emerging technology — and stocks of select companies — will take off.

### **STEP 2: IMPLEMENT THE NETWORK EFFECT**

Then I tap into my network around the globe to locate specific companies developing this paradigm. That helps validate the legitimacy of a new paradigm... and to get insider knowledge of how much money is really at stake.

### **STEP 3: VERIFY GROWTH TRAJECTORY**

The final step is to leverage my team of top financial analysts to pinpoint the companies with the highest growth potential and strongest business models.

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What does that mean for you?

It means that the future will arrive faster than ever because the nature of the grand challenges has changed.

When imagining new solutions for the Cryptocosm, we see that much of the infrastructure is already in place for enabling technology’s next “Cambrian Explosion” (The radiation event which resulted in that period’s life forms diverging into the major groups of animals we’d be able to recognize today).

The number of block diagrams that include a box labeled “Miracle Happens Here” are far fewer. In other words, creating the key enabling technologies are no longer the difficulty. Rather, innovation has shifted to the ways companies synthesize new solutions from existing technologies, and find ways to diffuse them into the wild.

Understanding these dynamics will be the key to building out the Cryptocosm.

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The companies that see this — *and know where they're going* — are the ones that will reap the early rewards as the Cryptocosm plays out on its global stage.

Especially the companies that stay at the forefront of innovation, which is evolving.

You see, innovation now comes from connecting disparate and sometimes nonobvious dots — both existing and emerging. It doesn't take place so much *within* disciplines as it does at the intersections and boundaries *between* them.

And to this point, blockchain is Exhibit A.

As novel as blockchain appears to be, it's actually based almost entirely on mature technologies.

Like the cryptographic hash, public key encryption, the concepts of virtual machines, distributed computing, smart contracts, and other components.

Blockchain *combines* these elements in experimental ways that create entirely new value. For instance, it enables such things as secure and authenticated transactions. It eliminates the middleman. It provides new forms of digital assets. It's created a platform for maintaining immutable records, supply chain traceability, and more.

So in the context of the Cryptocosm, which companies are connecting these dots?

Who are the leaders who are synthesizing the innovations that will ultimately yield this rapidly emerging Cryptocosm?

I will reveal our first round of Moonshot stocks in a moment.

But first, an important update...

## **The Hunt for the Best Cryptocosm Play**

During our live event you may have heard me mention a company that I was very excited about — **a \$142 million public company headquartered in New York City.**

That company is Ideanomics (IDEX).



Ideanomics operates a consulting business that helps create blockchain enabled financial services. The company has a lot of exciting projects, but the most interesting is its Fintech Village.

The village is expected to be constructed in an area formerly used as part of the UConn campus. This Fintech Village is intended to be a “go-to-market hub” for startup companies focused on blockchain and AI applications.

In our initial review, we liked the idea of what they are trying to do.

That’s why it was the focus of my event. Its unique connection to the Cryptocosm was too exciting to ignore.

The thing is, after taking a closer look at their financial situation — and talking with their investor relations team — we ultimately decided that the company is simply too risky to recommend at this time.

Why?

They’ve had some tense negotiations about the future of the Fintech Village, and some uncertainty over how they can actually pay for building it.

Ultimately, we couldn’t determine exactly what their plan was for the Fintech Village. There are also some doubts about whether they can even pay for it. So we want to wait for more clarity.

I know. After hearing so much about this stock during my presentation, you were probably excited to jump in right away.

There is no reason to rush into it, though. I want to make sure my readers get the absolute best stock recommendations possible.

And sometimes we will find companies we initially like — only to discover that they are missing key features of a strong investment opportunity.

So we are putting Ideanomics on our watch-list for now.

But here’s the good news... We have another stock with a direct link to the Cryptocosm.

And it’s our first (of many) Moonshot stock we’re recommending today

## Moonshot #1: Impinj (PI)

### TRENDS: BLOCKCHAIN, IOT

The first company we're adding to our portfolio is our top Cryptocosm recommendation right now. And with good reason.

Founded by the legendary Carver Mead, **Impinj (PI)** is poised to play a crucial role in the building out of the Cryptocosm.

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### Who is Carver Mead?

There are two things I want you to know about Carver Mead, the legendary American scientist and engineer.

His name might not ring a bell. But you've experienced the results of his work in many of the technologies you use every day — including the device you're using to read this report.

They can all be traced back to him and his protégés at Caltech.

Now, I would guess that the phrase “Moore's Law” does ring a bell. Well, that comes from Carver.

Moore's Law states that computer chips are compounding in their complexity at a near constant per unit cost — a mechanism that has enabled the integration of more than a billion transistors on a single silicon chip today.

Carver's work made this possible.

The second thing I want you to know is that Carver has been involved in the founding of nearly 30 companies — several of which have transformed industries.

And Impinj happens to be one of those companies.

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In short, Impinj enables a “digital life” for physical items.

Let's unpack that a bit.

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Imagine the possibility of creating a digital representation of virtually any unique item on the planet — and then connecting that item to the internet.

This is the very premise and essence of the “Internet of Things” (IoT).

Indeed, the whole point of IoT technologies is to link the physical world with the digital world. And this is made possible by a technology called radio frequency identification — RFID.

RFID provides the identification layer for the IoT.

Impinj literally wrote the dominant RFID standard (the EPC UHF Gen2 Air Interface Protocol). So it should come as no surprise that Impinj is the technology leader in this space.

As you may know, RFID has been around for a while. You actually use a variant of RFID whenever you make a payment with your phone at a point of sale (POS) terminal.

RFID (in the form of near-field communications, or NFC) is what establishes the link between your phone and the POS.

Now, you might recall the hype that surrounded Walmart’s experiment with RFID. It mandated that its top 100 suppliers tag all pallets in distribution centers with RFID. But the experiment failed.

Only because it turned out that the technology was not quite ready for prime time.

But times have changed.

To date, Impinj has connected more than 30 billion unique items, and the technology is several generations in now.

In other words, its technology is proven and mature. Yet it’s still evolving.

Which is where its tie-in to the Cryptocosm comes into play.

Impinj’s recent moves will have profound and surprising implications for the Cryptocosm.

You see, the company has realized that the missing link to mass adoption of RFID technology is the blockchain.

And once blockchain reaches its tipping point, which many industry analysts project to be in the 2023 timeframe, it is going to accelerate the adoption of RFID at an exponential scale.

Let's take a closer look at RFID and see how it will interact with and complement emerging blockchain applications.

To start, you can think of an RFID tag as a "smart" barcode, but with other substantial differences.

For instance, regular barcode requires line-of-sight reading. RFID tags don't, since they read via radio waves — and radio waves can "see" through walls.

A barcode simply identifies the class of an item and its manufacturer. RFID does that also. But it adds a unique serial number for each item.

What's more, the RFID tag can be attached at any level of desired granularity, be it a pallet, carton, or individual object.

Tags can even be embedded directly into a product or its package, encased in a product as part of an injection molding process, or even sewn directly into a garment with conductive thread that acts as the tag's antenna.

That way it's permanently integrated with the item itself. That makes it easy to track, authenticate, and trace the item across the supply chain — and its post-sale life.

As for the number that is encoded on the RFID tag's chip, it is called an EPC — electronic product code. And if you go into a store and read a tag on an item, all you will get is a 96-bit EPC.

Now, to the casual reader, that code is meaningless. But that's all about to change.

Currently, the internet doesn't recognize EPCs.

I know that sounds strange, especially while we're talking about

the Internet of Things. “Things” have to be recognized for that concept to work.

There’s another wrinkle: There is no concept of ownership in the present incarnation of the internet. By that I mean there is no way to record who owns a particular item.

Indeed, when it comes to dealing with an item and its metadata — its origin, history, authenticity, and provenance — the internet is fundamentally broken.

So how do we get around all this?

## Applying Practice to Theory

Impinj’s technology, combined with the power of the blockchain, will get us there.

Let’s see how tracking ownership would work in actual practice. Because, as Yogi Berra also said,

*“In theory, there’s no difference between theory and practice; in practice there is!” Another profoundly astute observation!*

We’ll use a bicycle as an example...

In this scenario, the bicycle manufacturer attaches or embeds a tag in the bike’s frame or another area where it can’t be tampered with.

That tag is programmed with an EPC that includes the manufacturer’s identity, the bike’s model number, and a unique serial number for that particular bike. At this point, think of the EPC as a pointer — in effect, a URL for the physical item.

The bike is then shipped to a retail store. A customer comes along and reads the bike’s tag with this smartphone.

Only now, the EPC — acting like a URL — actually points somewhere.

The tricky part is figuring out where to point. If you’re the store owner, you want it to link to the store, not the manufacturer. After all, the store now owns the bike.

Then, after it's purchased, the tag should point to the customer.

The problem is, nowhere in this version of the internet do we find the concept of transferring the URL to the current owner of the item.

Again, that's where blockchain comes in...

Blockchain provides the means to record an item's entire chain of custody.

At each change in the item's authenticated ownership status, the blockchain automatically records the corresponding contract fulfillment via the actual physical transfer of the item ownership (and its digital representation). This happens during the purchase using the item's RFID tag's encoded EPC number, which is now tied to the blockchain.

Ultimately, while the RFID ensures that I received the right bike, that it is authentic, and not counterfeit or stolen merchandise... the function of the blockchain is simply to verify the contracts.

The best part? Once this data is recorded to the blockchain, it's completely decentralized.

As the new owner, all the data now resides in my repository. It's my number. And it's the only thing that links the item to its past — where the bike was sold, who made it, etc. It becomes a cryptographic hash.

What's more, I can set the privacy protections however I want. Maybe I won't allow anyone to get any information from the RFID number. And because the bike now has a digital twin, its representation in the cloud (along with its history, provenance, warranty, and any other information I'd like to store about it) also belongs to me.

Maybe the most valuable part is, if the bike is stolen — and subsequently recovered by the police — it can be traced to me. The police will just read the tag, and it will point to my data repository. That way the bike will only be returned to me, its verified owner.

That is, of course, if I choose to share this information with the police.

## The Impinj RFID's Cambrian Effect

Now, we've used this simple example of a bicycle as it travels through the supply chain. But consider the many industries that will benefit from this combination of Impinj RFID and blockchain.

For example, a shocking number of pharmaceuticals in the supply chain are actually counterfeit. Meaning many people either receive no benefit from the drugs they consume, or worse, the fake drugs could be toxic.

Tying RFID-based product authentication to a blockchain can prevent this from happening. The blockchain documents the chain of custody — and will certify the authenticity of the pharmaceuticals.

This will eliminate fraud and other mischief.

Moreover, Impinj can fortify patient privacy. Rather than personal patient information printed on a prescription bottle, the EPC will be linked to a blockchain and to the crypto tag's public key. Thus preserving privacy.

Also consider the increasing frequency of food poisoning outbreaks. The combination of RFID and blockchain will enable the instantaneous traceability of food sources.

All this and other equally important applications bode exceptionally well for Impinj.

But that's not all...

Impinj's newest RFID tag chip series, the M700, is further reason to be excited about where the company is headed.

The chip is so small that it yields twice as many chips per silicon wafer than that of its nearest competitor.

That ties directly into Moore's Law — packing exponentially more digital functionality on the chip at a near constant per unit cost.

Moreover, this dramatic decrease in chip size will enable Impinj to add enhanced capabilities in the near future, including cryptographic authentication.

In other words, they'll eventually be able to integrate a crypto engine directly onto the chip, which will enable completely automated contract fulfillment — even as it authenticates items as the genuine articles.

Bottom line: Impinj boasts an attractive vision for the Cryptocosom — support of a decentralized ledger combined with item-level URL resolution, privacy, security, authentication, and proof of ownership.

Indeed, it comprehends all the value drivers of blockchain itself. Which is why we're adding this to our portfolio today.

**Action to Take: Buy Impinj (NASDAQ: PI) below \$35 per share.**

**BONUS! JUST ADDED...**

## **Moonshot #2: Mitek (MITK)**

### **TREND: AI**

Like Impinj, this obscure small-cap stock will also have a hand in rebooting the internet. In fact, the technology this company is working on could be bigger than the iPhone.

Now, if you've ever made a mobile deposit, then you've probably used Mitek's technology.

That's because the software engineers behind Mitek *invented* this technology.

With that said, if you've never heard of the company before, I wouldn't be surprised. This technology is hidden behind the branding for the banks that use it.

And A LOT of banks use it — we're talking about more than 6,400 banking institutions. That's almost every banking institution in the U.S.



With that many clients using your tech, the company's financials look stellar.

The company has grown revenues by an average of 32% every year, for the past five years — and 28%, every year, over the past ten years.

Just to put that in perspective, that's faster than Apple. Faster than Google. It's even faster than Amazon.

In other words, Mitek has been quietly growing its business faster than the hottest tech companies of the past decade.

But the company is just getting started.

With Mitek, we find ourselves at yet another vital intersection of technologies that will help yield a robust — and trustworthy — Cryptocosm.

To realize how Mitek will be involved with the Cryptocosm, imagine this...

You log onto Airbnb — a safe and trusted platform for vacation rentals — and find an ideal property.

As you begin the booking process, you notice an invitation in the listing to contact the property owner directly to get a better deal, rather than completing the booking process through Airbnb.

It feels a little fishy, right? But heck, the property really is perfect. And maybe you don't blame the owners for trying to pocket the Airbnb service charge.

You decide to take them up on the offer, and run your payment through their portal.

Upon arrival at the designated destination, however, you discover that 1) the property doesn't actually exist, and 2) you've just been had.

Now let's look at a similarly scenario, from the host's perspective...

You've just rented your property to someone who registered with a fake ID.

When your guests check out the next morning, you discover that they've partied like a rock star — leaving you with a big mess, a lot of damage, and very little recourse.

Fake listings, fake accounts, fake IDs, fake websites — even fake people.

If the Cryptocosm is to flourish, it will only do so if it is built upon a foundation of trust — specifically digital trust. And that's why I like Mitek.

You see, Mitek is bringing a sophisticated neural network architecture to its mobile platform. Simply put, it ensures that the person you're dealing with really is who they say they are.

And they do that through a combination of biometrics — facial analytics — and computer vision-driven document analysis. When combined, these technologies verify and authenticate a person's identity.

The company has deep ties to facial recognition tech, too. Because the man behind the technology's continuing development is CTO Stephen Ritter.

Ritter formerly led engineering at Emotient — the facial expression-reading and analysis app acquired by Apple in 2016. As a consequence of that acquisition, Ritter and his team then went on to build Face ID for the iPhone 10.

Previously he led the development of groundbreaking security products at WebSense and McAfee. So Ritter clearly has the chops to create a state-of-the-art identity solution.

## **The Nuts and Bolts of Mitek's Authentication**

Here's how Mitek's authentication process works...

It involves users taking photographs of the front and the back of identity documents, like a passport. At that point, Mitek, enabled by its machine learning algorithms, extracts relevant data. It also captures the person's image on the document.

Associating these credentials with the person's facial biometrics, based on a mobile selfie, the technology completes the authentication process.

The processes seems simple enough right?

But it gets better, because Mitek's neural networks are also able to detect signs of forgery or tampering. It can even determine the actual "liveness" of the selfie image. That is, it can't be fooled by efforts to spoof the system with, say, a picture taken off of Facebook.

Mitek's AI has overcome many such challenges, which also include environmental difficulties — like poor lighting, glare, and bad angles. It accounts for physical distresses, too, including scratches, creases, and other artifacts that can obscure a document image.

It can even compare a cropped-out portrait image from a driver's license to the selfie.

It's really quite remarkable. But why is this identity verification technology important? And why does it portend good things for Mitek?

Three reasons...

## **REASON #1: IDENTITY PROTECTION INITIATIVES**

The first involves recent and continuing regulatory developments that favor the company's business model. I'm talking about anti-money laundering laws and know-your-customer initiatives.

Because fraud is so rampant, identity has advanced to top of mind at numerous regulatory agencies.

The fact is, there are many millions of bank accounts that have never been verified. Consequently, banks will have to perform identity verification retroactively on all active accounts.

According to Ritter, "These new regulations really are driving the behaviors of the financial services and banking industries. And that has proved to be a boon to companies like Mitek — and especially for Mitek, given our history with mobile deposit. We're already trusted by the banking world."

## **REASON #2: THE DIGITAL GENERATION**

The lion's share of Mitek's business comes from new account onboarding. And many new banking customers prefer to establish their accounts entirely in the digital channel — without having to walk into the branch.

As you can imagine, these new customers are Millennials and Gen Zers. They not only prefer doing everything online, but they also comprise the largest demographic in the history of the world. As such, these digital natives are, quite naturally, the drivers of the digital economy.

These users want a quick, easy, and frictionless experience — attributes that, as you might imagine, only pile on more demanding engineering requirements for identity solutions.

Mitek's identity verification solution allows for a super convenient user experience, without sacrificing security. It actually cuts the new customer onboarding process down to as little as two minutes.

## **REASON #3: INCREASINGLY SOPHISTICATED CYBERCRIMINALS**

In the context of the Cryptocosm, security means the safety of your own identity, your own device, and your own property. And that safety must extend to the institutions — like banks — with whom you share your identity.

In this sense, there is simply nothing more fundamental than one's unique, verified, and authentic digital identity.

Unfortunately, in the current paradigm, this identity is under relentless attack. And cybercrime is only becoming increasingly sophisticated.

A newly emerging example comes in the form of “deepfakes,” based on “generative adversarial networks.” Essentially, this is a nascent form of AI that involves one AI teaching another.

You've likely seen this in the news — hyper-realistic images of people who do not actually exist. This, of course, challenges the way we establish legitimacy for many things.

But as I mentioned above, Mitek is already a step ahead with its “liveness” algorithms.

As Ritter says...

*“I look at the world as an ongoing series of attacks and counter-measures. Just as people are working on techniques for generating convincing fakes, others are working on techniques for detecting them. As such, we factor all of these things into our classifiers and machine learning-based processes, and so are constantly testing against these scenarios and redefining the boundary conditions.”*

Taken together, Mitek represents the kind of company that is shaping the future of identity and helping to move the Cryptocosm forward.

It’s proving to be a successful business model, too. Remember those growth numbers I cited earlier? Mitek’s mobile identity business is actually growing twice as fast. About 70% a year.

And that growth should only continue from here, considering that the market for a unified, decentralized identity should reach \$30 billion by 2021. And the market for digital trust services is projected to hit \$1 trillion by 2021!

**Action to Take: Buy Mitek Systems, Inc. (NASDAQ: MITK) below \$15 per share.**

## **Moonshot #3: A10 Networks, Inc. (ATEN)**

### **TRENDS: 5G AND AI**

As more devices come online, and more data is transferred through faster 5G networks, the scope of everything that happens on the network will have to get bigger.

But how are we going to protect everything that connects to this network?

This is an important question. Maybe the most important question. With the new 5G rollout, we need more advanced network security products.

A10 Networks, headquartered in San Jose, California, provides these products.

More specifically, A10 provides network security products designed to protect 5G networks.

And their products are amazing.

Earlier this year, they won a Cyber Defense Magazine InfoSec Award for 5G Security. They won another award for their older DDoS Protection products. These awards are only given to the most innovative cybersecurity companies.

This commitment to innovation has already led to some significant attention. A10's list of partners and resellers includes Microsoft, McAfee, Symantec, Ericsson, and several other major brands.

It has also led to some big business.

On top of an impressive list of over 6,800 customers, A10 has recently secured design wins with the 3 largest wireless network providers in Korea, and has just helped the largest one launch the first 5G network.

This is an incredible first step for the rollout of 5G network security products, and it will help the company sell its security products to 5G providers in other countries.

In fact, one of their 5G products has already been adopted by a major provider in the Middle East.

But 5G is not their only focus. A10 is also continuously researching AI technology that protects against network attacks.

This means that networks using A10 products will have the ability to learn how to protect themselves better and stop threats much faster. Security can keep improving on its own, automatically.

As for the company's financials, A10 is certainly more on the risky side. But the company is expected to become profitable this year, a milestone achievement for a small tech firm.

**Action to Take: Buy A10 Networks, Inc. (NYSE: ATEN) below \$10 per share.**

## **Moonshot #4: CEVA, Inc. (CEVA)**

### **TRENDS: AI, INTERNET OF THINGS (IOT), 5G**

AI technology is really smart. And really useful.

But it can't do everything that people can do. AI needs to see and hear to function in the real world.

Well, CEVA's technology does it all. Headquartered in Mountain View, California, CEVA is a \$530 million company with huge plans.

Not only does the company develop the brains for AI (the processors that run the AI system), but also the eyes and ears.

That's right. CEVA's smart sensing products help the brains of an AI see and hear the world.

As you can imagine, this opens up a lot of new possibilities.

In IoT, CEVA's products can help security cameras identify a potential threat using facial recognition. When combined with CEVA's "ears," an AI can also detect and respond to threatening sounds, such as breaking glass.

For more information on the company, check out my report, [Self-Driving Your Portfolio To Profits.](#)

**Action to Take: Buy CEVA, Inc. (NASDAQ: CEVA) below \$30 per share.**

## **Moonshot #5: KEMET Corporation (KEM)**

### **TRENDS: IOT, AI**

When you think about all of these new high-tech devices coming into the market, you probably imagine that they're being created by startups.

Or maybe a major, well-known tech giant like Apple and Microsoft.

But this next company, KEMET, doesn't fit into either category.

The company isn't well known.

Yet it's as far from a startup as you can get. Founded in 1919, it has been operating for 100 years!

Now, the company is at the forefront of some groundbreaking new tech.

Kemet makes passive electronic components — such as capacitors, sensors, and actuators.

The list of IoT devices that can use KEMET products is impressive:

- Smart meters that help utilities plan for water and electric demand
- Smart light bulbs and appliances that help save energy
- Smart watches
- Drones
- Automotive dashboards, safety systems, and powertrains
- Virtual reality systems
- And many, many more.

They are also valuable for military applications, and as part of supercomputing components (which can help drive AI tech).

Think about KEMET as the pick-and-shovel play on AI and IoT.

For more details about the company and the Internet of Things industry, check out my report, [Free Money from the Internet of Things.](#)

**Action to Take: Buy KEMET Corporation (NYSE: KEM) below \$30 per share.**

## **Moonshot #6: Allot Ltd. (ALLT)**

### **TRENDS: 5G AND IOT**

Allot Ltd. is an Israeli company that provides advanced network security solutions.

Essentially, the company's core technologies examine network traffic to detect and eliminate threats.

It also provides a service specifically designed for the needs of IoT devices.



This IoT security service records the normal behavior of an IoT device, and then monitors the device to detect when it starts behaving strangely.

My other new report, *Free Money from the Internet of Things* covers more about this company as well. [Click here](#) to read it.

**Action to Take: Set a BUY LIMIT order on Allot Ltd. (TLV: ALLT) at \$8.00, and do not use more than 1% of your funds dedicated to this strategy.**

## Let's Get Started!

We're so excited to help Moonshots readers uncover even more explosive technology trends and stocks in the coming days and weeks.

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Sincerely,



George Gilder  
Editor, *George Gilder's Moonshots*

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