# The 630× Growth Map

**ATTENTION MOTLEY FOOL MEMBERS**

This is an exclusive excerpt from *The 630× Decade: 10 Stocks for the Next Tech Revolution*.

This excerpt has been lightly edited for clarity, and some information within it has been redacted as proprietary to the full strategy guide.

We hope you enjoy this “peek behind the curtain!”

## COMPUTERS ON WHEELS

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<td>The next massive chip industry</td>
<td>EV chip titans</td>
<td>Self-driving chips</td>
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*2021 – 2030*
There’s a major threat rippling across the entire automotive industry: There just aren’t enough chips to go around.

Both General Motors and Ford have warned that a shortage of computer chips to take billions away from their bottom line this year.

Today, electronics account for 40% the cost of a new car. Increasingly, investing in the automotive industry means investing in chip companies.

And as cars rapidly evolve to become “computers on wheels” with not only powerful computers to power self-driving but also dozens of microprocessors to monitor functions across an entire automobile, this trend shows no signs of decelerating.

Yet not every chip company has made inroads into the auto industry. So as self-driving spurs massive investment into infotainment systems and specialized chips and the rise of electric vehicles shifts the types of chips demanded inside cars, there will be winners and losers inside the industry.

Below, we’ve selected four companies that we’re confident will be on the “winners” side of the next decade of growth.

**Our Recommendation**

**PROPORTION OF TESLA’S SIZE:**

**WHY BUY:** Sales of chips to the auto industry are poised to take off

yet, in the coming years the growth of chips in both ADAS (advanced driving assistance systems) and full self-driving will mean the auto industry is increasingly gobbling up Tesla’s supply of cutting-edge chips.

The result? is likely still in the first inning of automotive chip demand, and the industry is poised to provide with a powerful catalyst across the next decade.

The full recommendation is in The 630× Decade — click here to unlock access!
While most consumers see self-driving cars as some far-away technology, the truth is that the building blocks of self-driving car technology have been quietly invading cars across the past decade.

For example, technologies like blind spot assistance and adaptive cruise control are becoming common in car upgrade packages. Both these technologies are stripped-down applications of the most advanced self-driving features today. Both also introduce entirely new types of chips and sensors into cars.

The market for ADAS, like the features mentioned above, was $17.6 billion in 2020 but is expected to nearly double to $32 billion by 2023.

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It’s difficult to overstate how important chips have become – and how much further autonomous vehicles could drive demand.

Electric vehicles are generally sold with not only advanced ADAS features, but also top-of-the-line infotainment systems, and an entirely different supply chain in parts and the chips needed to power and monitor the cars.

And while it’s possible to make a gas-powered self-driving car, most experts believe that electric vehicles will dominate this explosive market.

The result? Companies with massive leads in EV chips could see growth rates skyrocket if electric vehicle sales hit the inflection point we believe is likely in the coming years.

**RECOMMENDATION #1**

**Infineon**

**XTRA:** IFX & OTC: IFNNY

**WHY BUY:** 36% market share of a critical EV component

Because of this, IGBTs are the second most expensive part of EVs after the battery. Infineon leads the world with 36% market share. Perhaps more importantly, it has 58% market share in China, where the highest growth of EVs is likely to take place in the coming years.

**PROPORTION OF TESLA’S SIZE:** $1/12

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We hope you enjoyed this excerpt from our internal research report. Bottom line: As you can see from the chart below, the opportunity in autonomous and electric vehicles is a potentially economy-wide disruption unlike anything we’ve ever seen before.

To learn more about our complete game plan for investing in its growth across the years to come, simply click below to access your 630× Decade invitation.

**Unlock access to The 630× Decade!**

**Potential market values**

- $715 billion for smartphones
- $758 billion for cryptocurrency
- $2.1 trillion for the internet
- $8 trillion for driverless cars

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**DISCLOSURES**

The Motley Fool owns shares of Tesla. The Motley Fool has a disclosure policy.