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# **10 Stocks To Watch in 2025**

**—** *Published 23rd October, 2024*


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# 1. Rocket Lab (RKLB)

**Industry:** Aerospace & Defense

**Secular Trend:** Space Exploration & Commercial Space Launches



## Company Overview:

Rocket Lab is a leading player in the **small satellite launch** industry, providing cost-effective and frequent access to space. The company specializes in delivering **small payloads** to orbit with its **Electron rocket**, which has been successfully launching satellites for commercial, academic, and government clients. **Rocket Lab** is positioning itself as a critical player in the **global space race**, with plans to expand into **larger payload launches** using its upcoming **Neutron rocket**.

## What Makes Rocket Lab Unique:

- **Frequent Launch Capabilities:** Unlike many competitors, Rocket Lab focuses on frequent, reliable, and affordable access to space, launching missions nearly **monthly**, which has helped them build a strong reputation.
- **Cost Efficiency:** Their **Electron rocket** has revolutionized the small satellite launch market by offering cost-effective solutions for clients that don't need the size and expense of traditional rockets.
- **Reusability:** With their advancements in **reusability technology**, Rocket Lab is working toward the goal of reducing costs even further, making it competitive with larger players like SpaceX.

## Bullish Thesis:

Rocket Lab stands to benefit from the continued growth in **demand for satellite launches**, driven by trends such as **telecommunications, defense, and space exploration**. As more companies and governments look to the stars, Rocket Lab's **nimble and cost-efficient launch solutions** give it a strong competitive edge. Additionally, the company is expanding beyond just launches, getting into **satellite manufacturing** and **spacecraft components**, which provides multiple streams of revenue.

Looking ahead, the upcoming **Neutron rocket** could position Rocket Lab to compete for **larger payload launches**, further expanding its market share. As one of the key players in a growing space economy, Rocket Lab is well-positioned for continued growth through **2025 and beyond**.

## 2. Hims & Hers Health, Inc. (HIMS)

**Industry:** Telehealth & Consumer Healthcare

**Secular Trend:** Digital Health & Direct-to-Consumer Wellness



### **Company Overview:**

Hims & Hers is a **direct-to-consumer telehealth** company that provides personalized health and wellness services. Their platform allows patients to consult healthcare professionals online and access prescription medications, supplements, and other health products delivered directly to their homes. The company initially focused on **men's health** but has expanded to cover **mental health, dermatology, women's health**, and more. By simplifying the healthcare process, **Hims & Hers** is empowering patients to take control of their well-being from the comfort of their homes.

## What Makes Hims & Hers Unique:

- **Telehealth Leader:** Hims & Hers has positioned itself as a leader in the growing **telehealth** market, offering accessible and affordable healthcare solutions to millions of patients. The company is capitalizing on the increasing demand for **remote healthcare**.
- **Direct-to-Consumer Model:** Unlike traditional healthcare providers, Hims & Hers operates on a **subscription-based model**, offering customers convenience and affordability while allowing the company to generate recurring revenue.
- **Expanding Product Lines:** What started as a platform focused on hair loss and erectile dysfunction treatments has now expanded to cover **mental health, sexual wellness, and skincare**, giving them broad appeal across multiple consumer health segments.

## Bullish Thesis:

Hims & Hers is poised to benefit from the **accelerating shift toward digital health** and the increasing acceptance of **telemedicine**. Their **consumer-focused approach** taps into growing demand for convenient, personalized healthcare solutions. With a business model that capitalizes on **recurring revenue** from subscriptions, they have created a scalable and predictable growth trajectory.

As more consumers move away from traditional in-person doctor visits, the telehealth industry is expected to continue expanding. **Hims & Hers' brand recognition**, broadening product offerings, and data-driven approach give it the potential to become a household name in digital healthcare. The company is also making strides in **mental health services**, which are projected to see continued growth in demand. As telehealth becomes a key part of modern healthcare, **Hims & Hers** is positioned for long-term success.

**\*Disclaimer:** Jared Mann owns a long position in **HIMS stock**, you can view his stock pick research he sent to paid stock members [here](#).

### 3. Joby Aviation (JOBY)

**Industry:** Urban Air Mobility & Electric Aviation

**Secular Trend:** Sustainable Transportation & eVTOL (Electric Vertical Takeoff and Landing)



#### Company Overview:

Joby Aviation is a pioneer in the emerging **urban air mobility (UAM)** industry, developing **electric vertical takeoff and landing (eVTOL)** aircraft designed to revolutionize urban transportation. Joby's aircraft offer zero-emissions, quiet, and efficient short-distance air travel, which aims to reduce congestion and provide faster alternatives to traditional ground transportation. The company is positioning itself to be a leader in **air taxi services**, potentially transforming the way people commute in cities.

## What Makes Joby Aviation Unique:

- **First-Mover Advantage:** Joby is one of the first companies in the UAM space to secure important regulatory milestones, including being the first eVTOL company to receive the **Part 135 Air Carrier Certificate** from the FAA, allowing it to operate as an air taxi service.
- **Environmental Benefits:** Joby's **electric aircraft** offer zero-emissions travel, which aligns with the global trend toward **sustainability** and decarbonizing transportation.
- **Partnerships and Funding:** Joby has secured strong financial backing from notable investors, including **Toyota** and **Uber**, which positions them well for scaling operations and bringing their technology to market.

## Bullish Thesis:

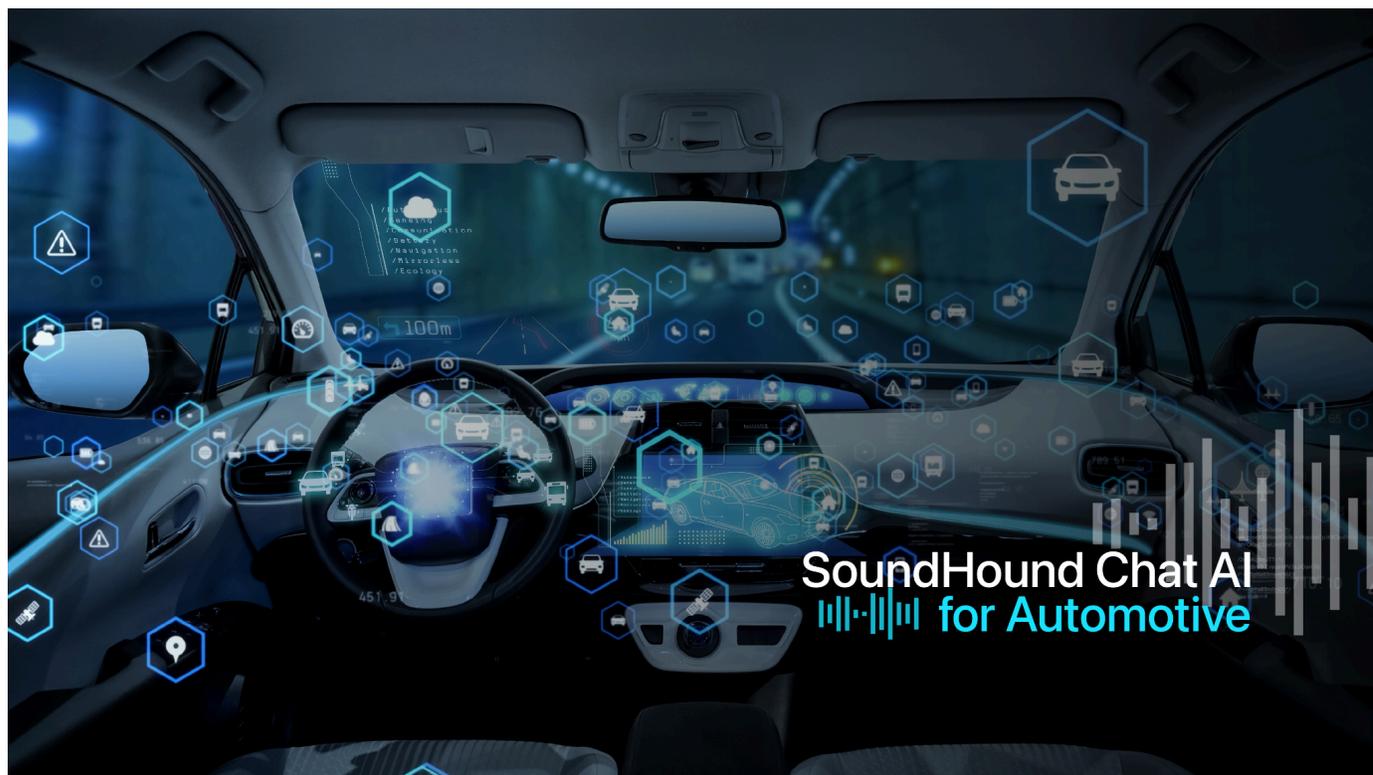
Joby Aviation is at the forefront of a major transportation shift with the potential to disrupt urban mobility. As cities become more congested, demand for faster and more sustainable transportation alternatives is growing. Joby's eVTOL aircraft could offer a transformative solution for urban commuters, and the company's early regulatory approvals give it a significant advantage over competitors.

The global trend toward **decarbonization** and reducing traffic congestion positions Joby to benefit from both **environmental** and **practical** transportation needs. Additionally, the **support from key investors** and **partnerships with leading companies** in the mobility space further solidifies its growth potential. With plans to roll out commercial air taxi services in the near future, Joby Aviation is well-positioned to capitalize on the growing demand for **urban air mobility** in the years to come.

## 4. SoundHound AI, Inc. (SOUN)

**Industry:** Artificial Intelligence & Voice Technology

**Secular Trend:** Voice AI & Conversational AI



### **Company Overview:**

SoundHound AI is a leader in **voice recognition** and **conversational AI** technologies. The company provides advanced voice AI solutions to industries ranging from **automotive** to **hospitality** and **consumer electronics**.

SoundHound's AI-powered platform enables real-time voice interactions and natural language understanding, making it possible for businesses to integrate voice-enabled assistants into their products and services. By improving the ability for machines to understand and respond to human language, **SoundHound** is helping to drive the **voice AI revolution**.

## What Makes SoundHound AI Unique:

- **Proprietary Technology:** SoundHound's **Houndify platform** is a proprietary conversational AI system that enables more accurate and natural voice interactions compared to traditional systems, giving it a competitive edge in the growing voice AI market.
- **Diverse Applications:** From cars and appliances to restaurants and call centers, SoundHound's voice AI technology is used across a variety of industries, giving it wide-ranging applications and scalability.
- **Growing Partnerships:** SoundHound has built strong partnerships with **global companies** like Hyundai, Mercedes-Benz, and Pandora, expanding its influence and market penetration.

## Bullish Thesis:

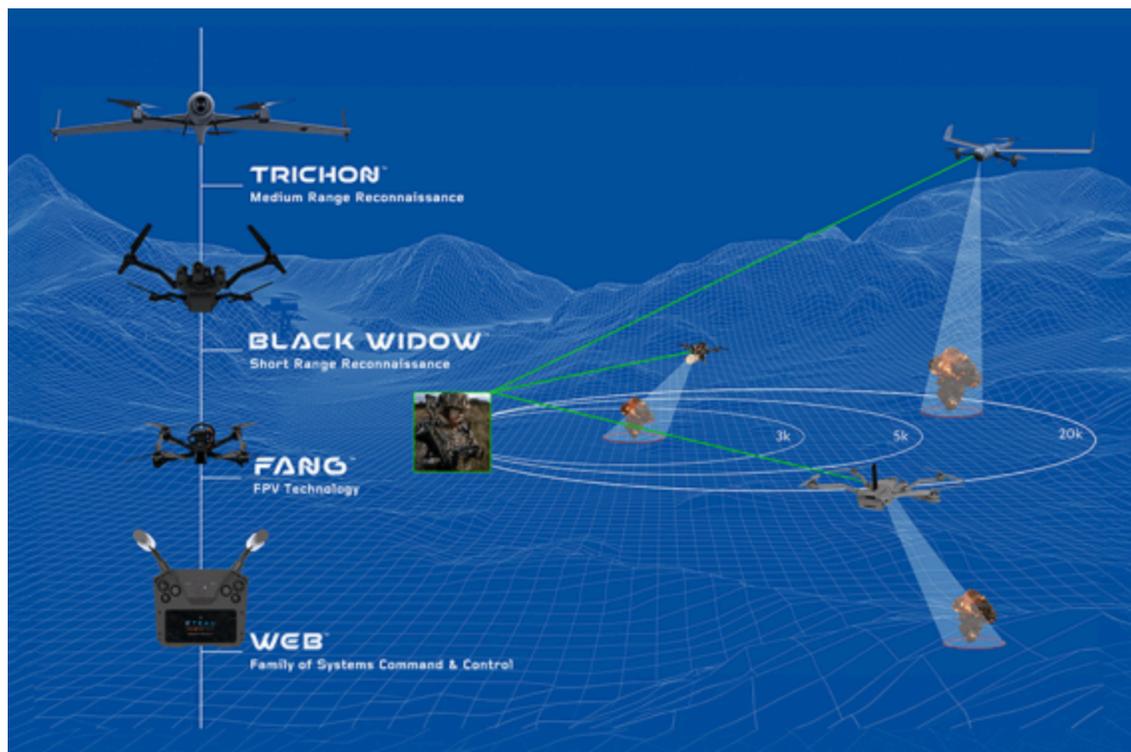
The demand for **voice-enabled technology** is rapidly expanding as consumers and businesses increasingly adopt **smart devices** and **AI-driven interactions**. With voice AI becoming a key component of everything from cars to smart speakers, SoundHound is well-positioned to benefit from this **secular trend**. Its **Houndify platform** offers businesses an AI solution that can integrate into their existing systems, creating significant growth potential as companies seek to enhance user experience through voice technology.

In a market expected to grow exponentially as more devices and systems become **voice-enabled**, SoundHound's proven technology and industry relationships put it in a strong position for the future. As the adoption of voice AI continues to rise across industries, **SoundHound AI** is positioned to capture a large portion of this expanding market, making it a compelling stock to watch in 2025.

## 5. Red Cat Holdings, Inc. (RCAT)

**Industry:** Drone Technology & Aerospace

**Secular Trend:** Autonomous Drones & Defense



### Company Overview:

Red Cat Holdings is a growing player in the **drone technology** space, providing **autonomous drone solutions** for both **defense** and **commercial applications**. The company operates through several subsidiaries, each specializing in different aspects of the drone industry, from **drone manufacturing** to **drone-as-a-service** (DaaS) offerings. **Red Cat** has gained traction in the military and defense sectors, offering drones that are capable of performing **surveillance, reconnaissance**, and other critical missions.

## What Makes Red Cat Unique:

- **Focus on Defense:** Red Cat's emphasis on the **military and defense sectors** sets it apart from many competitors in the commercial drone space, with contracts and partnerships that cater to government and defense organizations.
- **End-to-End Drone Solutions:** Red Cat offers a wide range of drone services, from **hardware** to **software**, providing an end-to-end solution for customers in various industries, including agriculture, logistics, and defense.
- **Strategic Acquisitions:** Red Cat has made strategic acquisitions, such as **Skypersonic** and **Teal Drones**, that have expanded its capabilities in both **drone manufacturing** and **autonomous operations**.

## Bullish Thesis:

With the **increasing demand** for drones in defense, commercial, and industrial applications, **Red Cat Holdings** is positioned to capture a significant portion of the market. The company's focus on the defense sector, particularly with **military-grade drones**, gives it access to high-value contracts that can drive revenue growth. As countries around the world continue to invest in **unmanned aerial systems (UAS)** for national security, Red Cat stands to benefit from the expansion of this market.

Additionally, Red Cat is expanding into the **commercial drone space**, which includes applications in **agriculture, infrastructure monitoring, and logistics**. With its diversified product offerings and growing client base, Red Cat is well-positioned to capitalize on the **global drone revolution** in the years to come. As drone technology continues to evolve and be integrated into more industries, Red Cat Holdings has the potential for significant growth through 2025 and beyond.

## 6. OppFi Inc. (OPFI)

**Industry:** Fintech & Consumer Lending

**Secular Trend:** Financial Inclusion & Alternative Credit Solutions



### Company Overview:

OppFi is a **financial technology** company that provides **accessible credit solutions** for consumers who are underserved by traditional banks. The company uses its proprietary **technology platform** to offer **personal loans** and **credit access** to consumers with lower credit scores. By using advanced algorithms and data analytics, OppFi can assess credit risk more effectively and provide **fairer credit solutions** to those who might otherwise be denied loans. Their goal is to expand **financial inclusion** by offering more equitable lending options to consumers in need.

## What Makes OppFi Unique:

- **Alternative Credit Solutions:** OppFi focuses on serving the **non-prime credit market**, which is often ignored by traditional financial institutions. By offering fair and accessible credit, OppFi provides a vital service to millions of consumers.
- **Technology-Driven Platform:** The company uses a data-driven approach to assess creditworthiness, allowing them to offer loans to consumers who might otherwise struggle to access credit. This proprietary platform gives them a competitive edge in the growing fintech space.
- **Partnership Model:** OppFi works with various **banking partners** to offer its products, allowing for scalability and a more diversified lending model.

## Bullish Thesis:

As traditional financial institutions often overlook consumers with **non-prime credit**, OppFi is filling an important gap in the market. The **demand for alternative lending** is growing as more consumers seek financial inclusion and accessible credit solutions. OppFi's focus on using technology to **enhance credit underwriting** gives it a competitive edge, and the company's strong growth trajectory is supported by its ability to cater to an underserved market.

With financial inclusion becoming a key trend in the **fintech space**, OppFi is poised to benefit from increasing demand for **alternative credit solutions**. Additionally, the company's ability to work with **banking partners** and leverage its **proprietary platform** will help it scale and grow its customer base in the coming years. As the **consumer lending** landscape continues to evolve, OppFi is well-positioned to capture more market share and deliver solid growth through 2025.

## 7. Sweetgreen, Inc. (SG)

**Industry:** Fast Casual Restaurants & Healthy Eating

**Secular Trend:** Health & Wellness, Sustainable Food



### Company Overview:

Sweetgreen is a fast-casual restaurant chain that focuses on serving **healthy, sustainably sourced food**. The company has grown rapidly by offering consumers nutritious and customizable salads, bowls, and other plant-forward meals. With a mission to “reimagine fast food” for a healthier future, **Sweetgreen** taps into the growing demand for **health-conscious dining** options. The company is also committed to **sustainability**, working with local farmers to ensure fresh, responsibly sourced ingredients in every meal.

## What Makes Sweetgreen Unique:

- **Focus on Health & Sustainability:** Sweetgreen has carved out a niche in the fast-casual dining space by focusing on **healthy, clean eating**. Its commitment to **sustainable sourcing** and **organic ingredients** differentiates it from traditional fast food restaurants.
- **Tech-Enabled Operations:** Sweetgreen utilizes a **digital-first model** with a strong emphasis on mobile ordering and contactless pick-up, allowing it to efficiently serve customers while keeping costs low. This technological integration also enhances the customer experience and makes the brand more scalable.
- **Strong Brand Identity:** Sweetgreen has cultivated a **loyal customer base** of health-conscious consumers who value both the quality of the food and the company's commitment to **sustainability and transparency**.

## Bullish Thesis:

Sweetgreen is well-positioned to benefit from the **secular shift** toward **healthier eating** and **sustainable consumption**. As consumers become more aware of the impact of their food choices on both their health and the environment, Sweetgreen's focus on providing fresh, healthy, and responsibly sourced meals puts it in an ideal position to capture this growing market.

With its **digital-first model**, Sweetgreen can efficiently scale its operations, increasing its market presence across the U.S. while maintaining low overhead. The company's commitment to **sustainability** and **social responsibility** aligns with the values of a growing number of consumers, further strengthening its brand appeal. As demand for healthy, fast-casual dining continues to grow, Sweetgreen is poised for long-term success.

## 8. Serve Robotics (SERV)

**Industry:** Autonomous Robotics & Last-Mile Delivery

**Secular Trend:** Automation & Delivery Services



### **Company Overview:**

Serve Robotics is a leading developer of **autonomous robots** designed for **last-mile delivery**. The company focuses on building robots that can navigate sidewalks and urban environments to deliver food, groceries, and other goods directly to consumers. With a mission to make delivery more **efficient, cost-effective, and sustainable**, Serve Robotics is addressing the growing demand for **fast, contactless delivery services**. Their autonomous robots are

designed to operate seamlessly in crowded city environments, reducing delivery costs and improving logistics efficiency.

## What Makes Serve Robotics Unique:

- **Autonomous Delivery Innovation:** Serve Robotics is at the forefront of the **autonomous delivery revolution**, with robots that can navigate complex urban settings to fulfill last-mile deliveries without human intervention.
- **Sustainability Focus:** By reducing the need for traditional delivery vehicles, Serve's robots offer a **greener alternative**, cutting down on emissions and traffic congestion in cities.
- **Partnerships with Major Companies:** Serve Robotics has established **key partnerships** with large food delivery services like **Uber Eats**, which allows them to scale quickly and integrate their robots into established delivery networks.

## Bullish Thesis:

The future of **last-mile delivery** is increasingly moving toward **automation** as demand for quick, efficient, and contactless delivery services continues to rise. Serve Robotics is well-positioned to capitalize on this trend with its cutting-edge autonomous robots that offer significant cost savings and operational efficiency for companies in the logistics and food delivery industries.

As more businesses and consumers seek **sustainable solutions** for urban delivery, Serve's zero-emission robots provide a compelling alternative to traditional delivery vehicles. Their partnership with major companies like **Uber** gives them the platform to rapidly scale their technology. With cities around the world becoming more congested and concerned about environmental impact, Serve Robotics is poised for **long-term growth** as a key player in the autonomous delivery sector.

## 9. Applied Digital Corporation (APLD)

**Industry:** Data Centers & High-Performance Computing

**Secular Trend:** Digital Infrastructure & Cloud Computing



### **Company Overview:**

Applied Digital Corporation specializes in providing **next-generation data centers** optimized for **high-performance computing (HPC)**, including applications like **artificial intelligence, machine learning,** and **blockchain**. With a focus on delivering scalable and energy-efficient data infrastructure, **APLD** is helping to meet the growing demand for **cloud computing** and **digital transformation**. Their data centers are designed to support the **power-hungry** applications of the future, offering high computing power while maintaining low energy costs.

## What Makes Applied Digital Unique:

- **Focus on High-Performance Computing:** Unlike traditional data center providers, Applied Digital specializes in infrastructure tailored for **HPC**, which is critical for applications like AI, blockchain, and scientific simulations.
- **Energy Efficiency:** APLD has positioned itself as a leader in the push for **sustainable digital infrastructure**, focusing on building **energy-efficient data centers** that reduce operational costs and environmental impact.
- **Blockchain & AI Readiness:** The company is particularly focused on providing infrastructure for **blockchain** and **artificial intelligence**, sectors that are expected to see explosive growth in the coming years.

## Bullish Thesis:

As the world becomes increasingly dependent on **cloud computing** and **digital infrastructure**, the demand for **high-performance data centers** will continue to rise. Applied Digital is strategically positioned to benefit from this trend with its **scalable, energy-efficient infrastructure** that supports the growing needs of industries like **artificial intelligence, machine learning, and blockchain**.

In addition, the company's focus on building **cost-efficient** and **sustainable solutions** aligns with the global shift toward **green energy** and **sustainability** in tech. With data demand increasing and the rise of computationally intensive applications, **APLD** is well-positioned to capture significant market share in the booming **digital infrastructure** sector. Their specialized focus on supporting next-gen technologies makes them a key player to watch in 2025 and beyond.

## 10. Stem, Inc. (STEM)

**Industry:** Clean Energy & Smart Energy Storage

**Secular Trend:** Renewable Energy & Energy Storage



### Company Overview:

Stem, Inc. is a leader in **AI-driven clean energy storage solutions**. The company provides **energy storage systems** that help businesses and utilities optimize energy use, reduce costs, and integrate **renewable energy** sources like solar and wind. Stem's platform, **Athena**, leverages **artificial intelligence** to manage energy storage efficiently and in real-time, helping customers lower energy bills, improve energy reliability, and reduce carbon footprints. Stem plays a critical role in the shift to a more sustainable and **decentralized energy grid**.

## What Makes Stem Unique:

- **AI-Driven Platform:** Stem's **Athena** platform uses advanced AI to optimize the storage and use of renewable energy, making it a powerful tool for businesses and utilities looking to transition to clean energy.
- **Energy Storage Expertise:** Stem focuses specifically on energy storage solutions, which are crucial for the broader adoption of **renewable energy**, as they help manage the intermittency of solar and wind power.
- **Growth Through Partnerships:** Stem has established partnerships with **solar developers, utilities, and commercial clients**, expanding its presence in both the **commercial** and **utility-scale energy markets**.

## Bullish Thesis:

As the world transitions to **renewable energy**, the need for efficient **energy storage** will only increase. **Stem** is well-positioned to benefit from this trend with its **AI-driven platform** and innovative storage solutions that allow businesses and utilities to manage their energy needs more efficiently. The company's focus on helping customers transition to **clean energy** aligns with global regulatory and environmental trends, making it a compelling investment.

The rise of **decarbonization** and the push for **renewable energy** across the globe creates a massive opportunity for **energy storage** companies like Stem. As solar and wind energy adoption accelerates, Stem's energy storage solutions will play a pivotal role in managing **energy supply and demand**, ensuring the stability of the grid while reducing emissions. With **AI at the core** of its strategy, **Stem** is positioned to be a key player in the clean energy revolution, making it a top stock to watch in 2025.

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