



## Truckin' It

A couple of weeks ago, I drove across the country to settle into my new home. It was a 3,000-mile journey.

Driving isn't my thing. I consider myself a "Bubble Boy". I typically have a 10-mile bubble around where I live, and if something is beyond that, I'd rather fly!

Nonetheless, I had to drive. We took our time and turned it into what ended up being a wonderful trip.

Because I don't listen to the radio or audiobooks, I had a lot of time to think *and* observe.

As the great Yankee Yogi Berra once said, "You can observe a lot by watching."

And there's a lot to observe on the open road!

For example, if you're going to speed like Mario Andretti, you have no chance of getting through Ohio unscathed. The number of state troopers practically outnumbered the cars on the road!

The highway in Indiana was total dog shit. It was like driving on the Moon.

Marriott Bonvoy points are a great deal. I used points the entire way and never paid for a hotel room except for the fee for our doggy. Many of the hotels were exceptionally nice.

I randomly ended up at the Carmichael Hotel in Carmel, Indiana, then right before the Indy 500. If you find yourself in the area, I highly recommend it. It's what I would call a "proper" hotel. I wish I could've stayed longer!

I also made investment observations.

The most significant investment observation I made is this: the whole green energy thing is the biggest scam there is.

Many investment “themes” are a scam.

It's a one-way ticket to lose money. Internet stocks. Cannabis stocks. Blockchain stocks. Special Purpose Acquisition Companies. Green energy stocks.

*Trillions of dollars* have been lost.

Here's the charts of two major green energy indexes over the past five years:

Market Summary > NASDAQ Clean Edge Green Energy

# 419.19

+37.01 (9.69%) ↑ past 5 years

Jun 18, 10:19AM EDT • Disclaimer



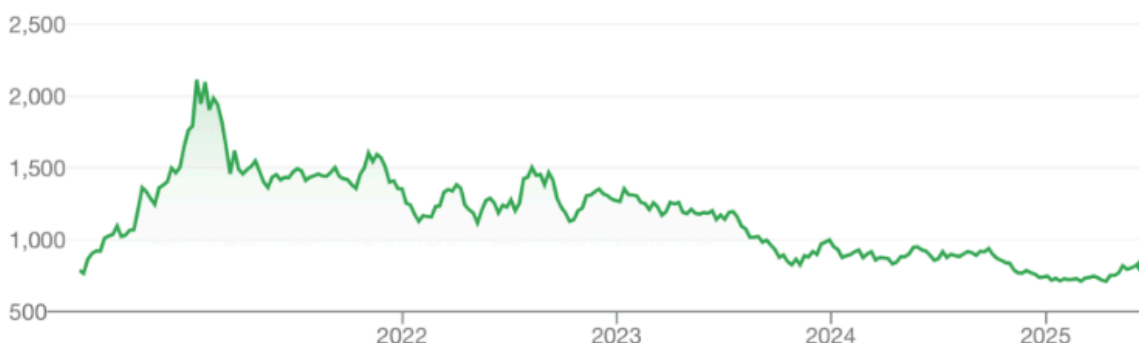
Market Summary > S&P Global Clean Energy Transition Index (USD)

# 817.54

+30.17 (3.83%) ↑ past 5 years

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1D | 5D | 1M | 6M | YTD | 1Y | 5Y | Max



Both had a parabolic ramp-up during the hype, only to reflect reality and suffer breathtaking falls back to Earth.

You'd make more money sticking cash in your couch cushions.

My observation was quite simple! There's no infrastructure to support electric vehicles. None. Zilch. Zero. Nada.

Since the Inflation Reduction Act in 2021 (also a scam), 214 stations had been built by December 2024, according to the *Associated Press*.

214!

It wasn't until I arrived in Sedona, Arizona, that our hotel even had charging stations!

Besides doing my best not to get swept up in a tornado while driving through Oklahoma, I had only one fear about driving. That was not to get stuck anywhere.

Getting stuck in Kansas kept me awake at night. Fortunately, my gas-powered car got me through.

Driving an EV? Yeah, you're getting stuck. Or you're waiting 8 hours to charge your car if the charger hasn't broken down *and* you can find one.

Like most things, follow the money. This movement isn't about saving the environment. It's about making some people rich while making everyone else's life miserable. Elon Musk is a smart guy, but he made most of his money by driving up the price of a stock that benefited from selling green energy tax credits rather than selling cars.

The biggest investment lesson is this. Avoid whatever everyone else is talking about.

Just plug ahead. Spend less than you make. Make periodic investments into broad markets such as stock indexes, fixed income, and precious metals.

If you want to speculate, do so with a smaller percentage of your portfolio using time-tested strategies, not ones built on hype.

For example, I follow trends. Trend following has a 200-year history of success. Now, trends won't perform amazingly every day, week, month, or year. *Over time*, trends lead to outsized returns.

Hype? It ends in tears.

The green energy investment theme is overhyped, and I'm happy to see that the bloom has fallen off the rose.

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