




Stock Picking for Green Investors



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The information in this presentation is intended for educational purposes only.

It is not investment advice, and I am not an investment advisor.

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About Tom Konrad

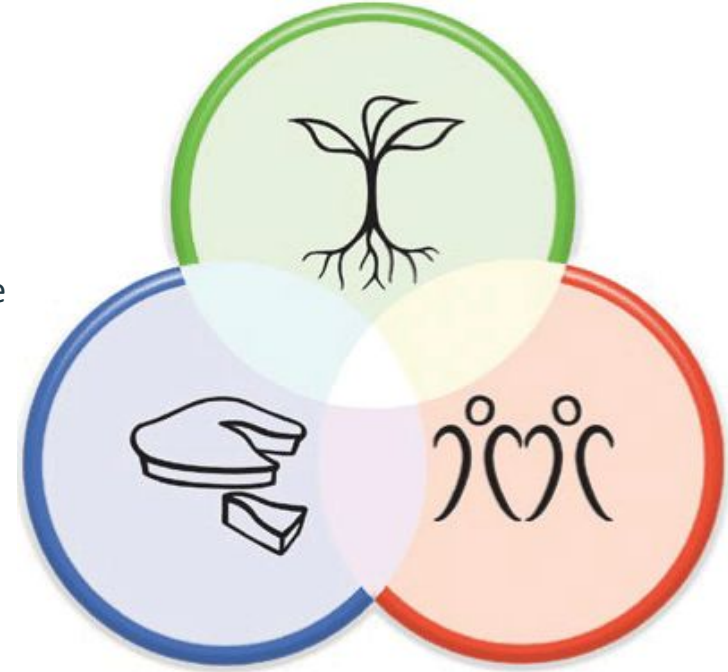


- **Managing stock market portfolios since 1999**
- **Editor at AltEnergyStocks.com since 2007**
- **Managed Green Global Equity Income Portfolio (GGEIP) since inception Dec 2013**
 - **15.9% compound annual total return (benchmark 9.0%)**
- **Chartered Financial Analyst charterholder**
- **Ph.D. in Math**
- **Chair, Marbletown Environmental Conservation Commission since 2014**

You might be a successful stock picker if...

- You'd rather be right than be liked
- You understand how to value companies
- You approach stock picking like a job
- You don't lie to yourself
- You are a better analyst than most other people investing in the stocks you select
- You learn quickly from mistakes
- You change your mind when you are wrong
- You don't need the money

ALL OF THE ABOVE!



Rule #1: Timing Matters

A bull market makes every investor look like a genius.

A bear market shows who is swimming naked.

- Late 2019 is a very old bull market.
- Hold your cash.
- Invest small and learn from mistakes.
- Use what you have learned after the crash.
 - Could be months, or years. Be patient.



Rule #2: Boring is good investing.

If you want to be the smartest person analyzing a specific stock, pick one no one else is interested in.

1. Small capitalization, but still profitable
2. An industry that no one wants to talk about

Scammers trying to cheat you out of your money aren't going to do it with composting toilets.



Stock Pick #1: Greystone Logistics (OTC:GLGI)

- Shipping pallets from low grade recycled plastic.
- Profitable
- Tiny and illiquid
- Catalyst: falling prices for used plastic.
- Boring.



Rule #3: Obtain a Yield

- Dividend stocks are not trendy... growth stocks are exciting.
- A good dividend can make you patient... even if it takes years for your investment thesis to pay off,



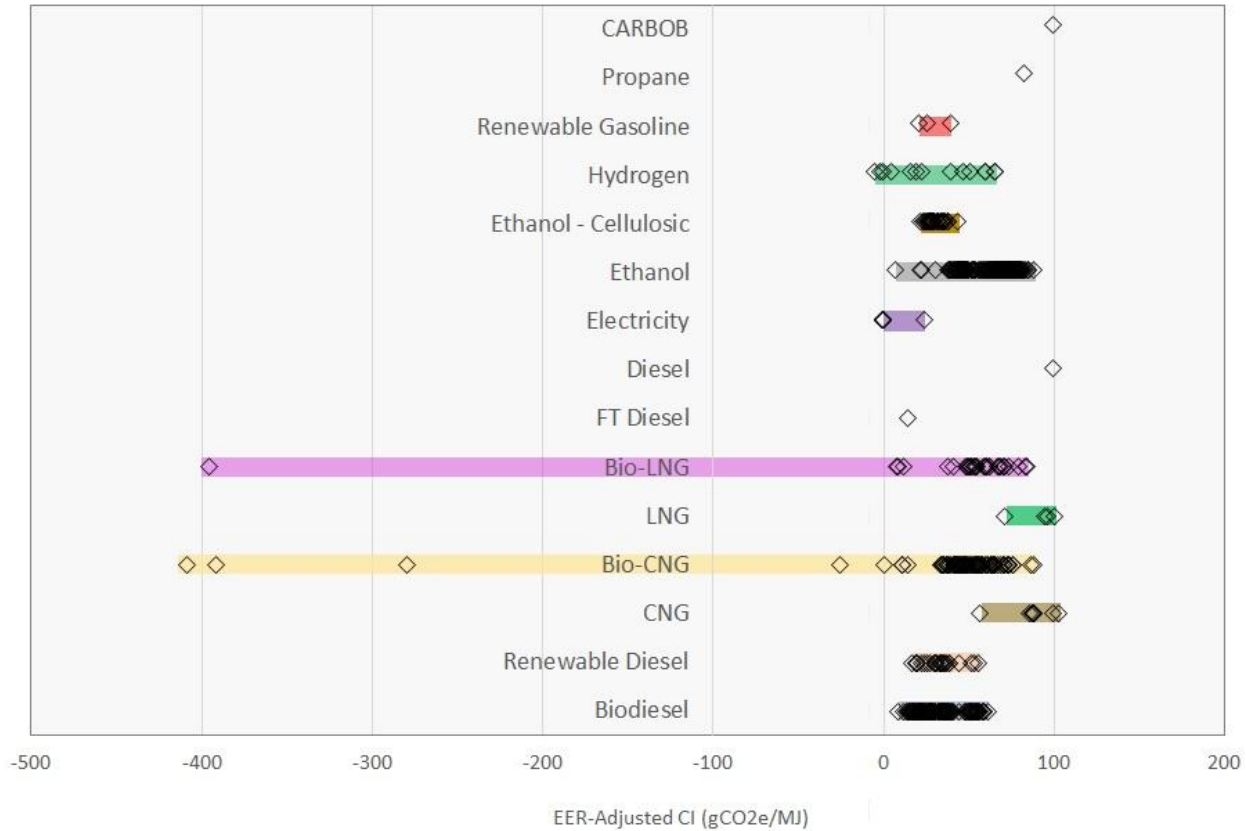
Stock Pick #2: Green Plain Partners (GPP)

- Ethanol Master Limited Partnership
- Yield 14.6% at \$13 stock price
- Biofuel industry in crisis because of Trump EPA actions favoring oil refiners and Trump trade war.
- GPP's parent, Green Plains (GPRE) hurting but should (IMO) survive and has contractual agreements which support GPP's revenue.
- Modern ethanol not great for the environment, but much better than gasoline.

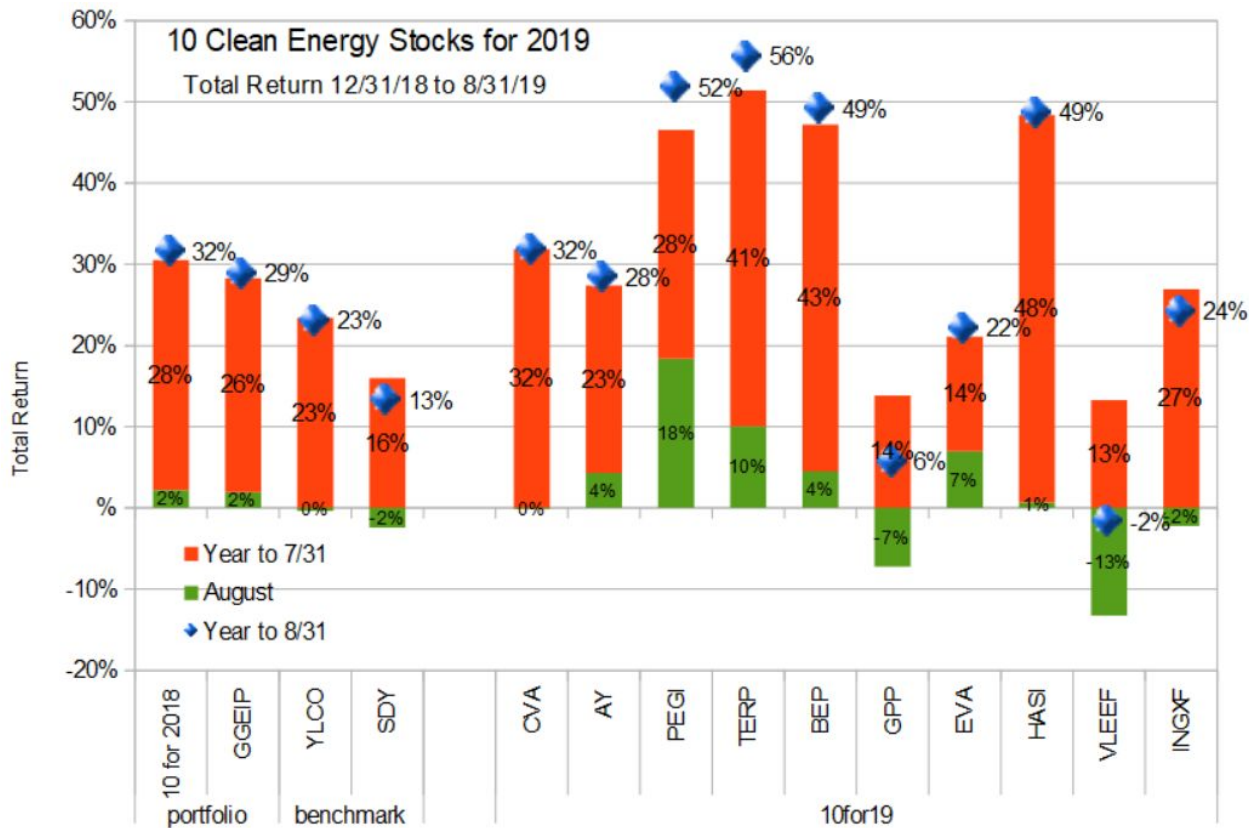


Carbon Intensity Values of Current Certified Pathways (2019)

Greenhouse gas intensity under California's Low Carbon Fuel Standard



More at AltEnergyStocks.com



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No investing presentation is complete...



...without a "nest egg."

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