

## INVESTMENT SOLUTIONS

## ROBOTICS & AUTOMATION

Investing in the Age of Automation



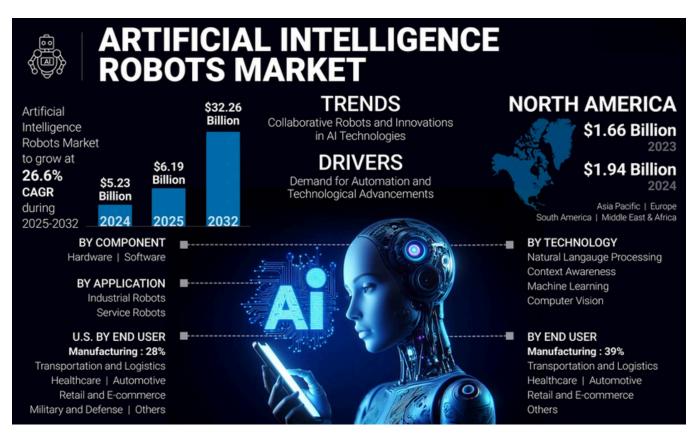
General Advice Only



### INTRODUCTION

In an era defined by rapid technological advancement, the robotics and automation sector stands out as one of the most compelling investment opportunities of our time. As of September 2025, this industry is not just evolving—it's exploding, driven by the convergence of artificial intelligence (AI), labor shortages, and the relentless push for efficiency across global economies. Investors seeking high-growth prospects should look no further: the global robotics market, valued at approximately \$71.78 billion this year, is projected to more than double in the coming decade, reaching up to \$218 billion by 2030. This surge is fueled by a compound annual growth rate (CAGR) of around 11.4% for industrial robots alone from 2025 to 2034, underscoring the sector's resilience and scalability.

At the heart of this opportunity lies the integration of AI with physical systems, enabling "embodied AI" that transforms robots from rigid machines into adaptive, intelligent partners. Key sub-sectors poised for explosive growth include fully self-driving transport, logistics and manufacturing automation, and collaborative robots (cobots) alongside humanoids. For instance, autonomous vehicles and robotaxis are disrupting a multi-trillion-dollar mobility market, with AI advancements allowing Level 4/5 autonomy to scale rapidly amid regulatory tailwinds in the US and China. Meanwhile, warehouse automation—powered by autonomous mobile robots (AMRs)—is addressing e-commerce demands, with North American companies ordering over 17,635 robots worth \$1.094 billion in the first half of 2025 alone. Healthcare robotics, from surgical systems to digital twins for research, offers precision and cost savings, while agriculture benefits from productivity-focused tools like autonomous tractors.



Yet, opportunities come with risks: geopolitical tensions, regulatory hurdles, and technological maturity could introduce volatility. Nonetheless, with trends like cobots leading in 2025—projected to grow 32% year-over-year—and Al-powered autonomy reshaping industries, the sector's "Fourth Industrial Revolution" narrative is irresistible. For forward-thinking investors, robotics and automation represent not just growth, but a stake in redefining human productivity. As labor gaps widen and Al matures, now is the time to invest in this transformative space—where innovation meets immense profitability.





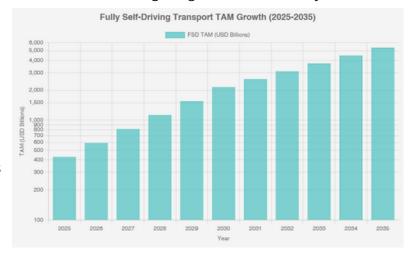
### INTRODUCTION

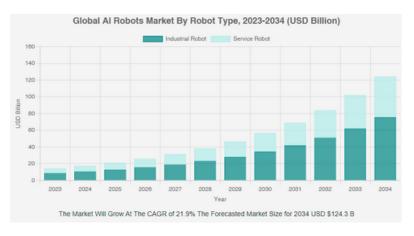
this industry is not just evolving—it's exploding, driven by the convergence of artificial intelligence (AI) with physical systems. The global robotics market, valued at approximately \$71.78 billion this year, is projected to more than double to over \$218 billion by 2030, fueled by a compound annual growth rate (CAGR) of around 11.4% for industrial robots alone from 2025 to 2034. Amid labor shortages, aging populations, and relentless efficiency demands, investors seeking high-growth prospects should look no further. Relentless push for efficiency across global economies, investors seeking high-growth prospects should look no further. This sector offers resilience and scalability, with AI enabling "embodied" intelligence that transforms rigid machines into adaptive, intelligent partners. Key sub-sectors poised for explosive growth include fully self-driving (FSD) transport, logistics and automation, and collaborative robots (co-bots) alongside humanoids—areas where innovation meets immense profitability.

Fully Self-Driving Transport represents the vanguard of this revolution, integrating Level 4/5 autonomy to

redefine mobility. Live deployments, such as Tesla's robotaxis navigating urban streets in California or Waymo's autonomous vans handling package deliveries in Phoenix, illustrate real-world viability. In China, DiDi Chuxing's self-driving fleets in Shanghai and drone-based medical supply drops in rural U.S. areas highlight regulatory tailwinds and infrastructure growth. This sector addresses surging demand for driverless solutions amid traffic congestion and safety concerns, with projections estimating a trillion-dollar market by 2035. Investments here promise high returns through recurring revenue models like subscriptions for software updates and fleet expansions.

Logistics and Automation form the backbone of global trade, where Al-driven systems are optimizing warehouses and supply chains. Real-world examples abound: Amazon's robotic arms in Seattle facilities accelerating order fulfillment, or Symbotic's Al platforms streamlining Walmart's distribution centers in Arkansas. In manufacturing, BMW's collaborative robots in Munich assist in electric vehicle assembly, while Foxconn's automated lines in Shenzhen produce iPhones with unprecedented precision. Fueled by e-





commerce booms and post-trade tension resilience, this area is monetizing rapidly, with warehouse robotics alone forecasted to exceed \$25 billion by 2028. Investors can capitalize on efficiency gains reducing costs by 20-30%, driven by mobile manipulators and autonomous guided vehicles.

Finally, Co-Bots and Humanoid Robots embody versatility and human-like adaptability, bridging industrial and service applications. Universal Robots' co-bots aid Danish furniture makers in intricate tasks, while Tesla's Optimus prototypes handle factory tools in Fremont. In retail, SoftBank's Pepper engages Tokyo shoppers, and Boston Dynamics' Spot inspects New York construction sites. With AI advancements enabling no-code programming and safe human-robot teaming, this segment is set for 32% year-over-year growth by 2030, targeting labor-intensive roles in healthcare, hospitality, and beyond. Humanoids, in particular, signal a shift to general-purpose automation, with pilots scaling in warehouses by late 2025.





## ROBOTICS & AUTOMATION

Full Self Driving Transport (FSD)

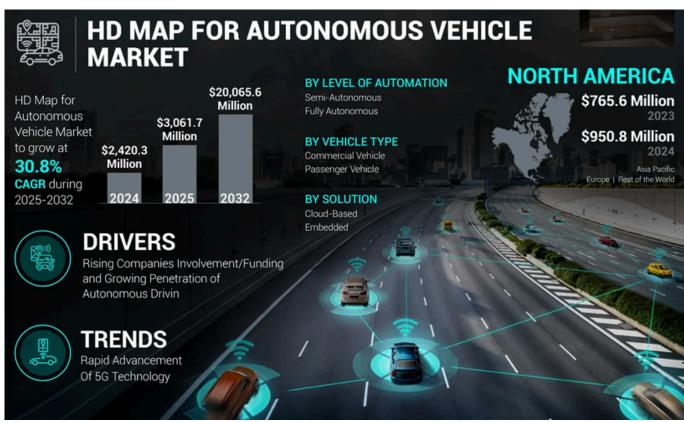




### **FULLY SELF DRIVING TRANSPORT**

Full Self-Driving (FSD) technology is revolutionizing transportation by enabling vehicles to navigate autonomously using advanced AI, machine vision, and sensor fusion to achieve Level 4/5 autonomy. As of September 2025, FSD is rapidly commercializing, with real-world deployments transforming urban mobility and logistics. This introduction highlights FSD's vast addressable market and the surge in regulatory approvals driving its adoption.

The addressable market for FSD is immense, contributing significantly to the robotics sector's projected \$237 billion valuation by 2027, with the U.S. segment reaching \$10.45 billion in 2025. FSD's total addressable market (TAM) is estimated in the trillions by 2035, driven by applications in robotaxis, delivery, and logistics. Tesla targets a \$20 trillion robotics market, fueled by labor shortages and efficient transport needs. Venture capital inflows of \$6 billion in H1 2025 underscore FSD's potential, with deployments like Tesla's robotaxis in California, Waymo's delivery vans in Phoenix, and DiDi's autonomous cars in Shanghai showcasing versatility. Analysts forecast 15-25% annual growth through 2026, with logistics tied to FSD holding a 39.6% market share.



Regulatory approvals are accelerating FSD adoption. In 2025, U.S. agencies like the NHTSA have expanded Level 4 testing in states like California and Arizona, supporting Tesla's public robotaxi app launch. Globally, China's approvals for DiDi and Europe's push for sustainable mobility align with carbon goals, enabling pilots in cities like Munich. These tailwinds, mirrored in healthcare robotics, are driving FSD's mainstream scaling. Events like CES 2025 highlight 40% growth in demonstrations, reinforcing U.S. leadership amid global competition.





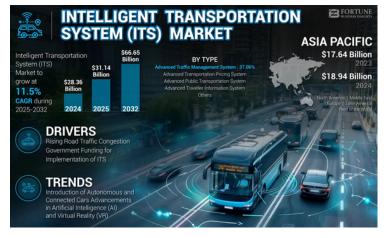
### **FULLY SELF DRIVING TRANSPORT**

The transportation sector is evolving with intelligent and autonomous technologies. The Intelligent Transportation System (ITS) market, valued at \$36.65 billion in 2024, is projected to hit \$228.36 billion by 2032 with a 25.7% CAGR, led by Asia Pacific (\$17.64 billion) and the U.S. (\$18.34 billion), driven by traffic congestion and government ITS investment, plus AI and VR innovations. The Self-Driving Bus Market, starting at \$3.34 billion in 2025, is expected to reach \$21.73 billion by 2032 with a 30.6% CAGR, with Europe's \$0.96 billion segment growing, fueled by electric and autonomous adoption for safety and mobility. The Autonomous Truck Market, at \$1.74 billion, anticipates a 10.8% CAGR through 2032, with North America at \$15.43 billion in 2024, driven by fuel efficiency and electrified COE segments. These trends signal a global shift toward sustainable, autonomous transport solutions.

The Intelligent Transportation Systems (ITS) market in Asia Pacific is experiencing robust expansion, projected to reach USD 31.14 billion in 2025, up from USD 28.36 billion in 2024, with a CAGR of 11.5% through 2032. Key drivers include rising road traffic congestion, government initiatives for smart city infrastructure, and integration of AI, IoT, and 5G technologies for advanced traffic management and public transport systems. The region, led by China and India, dominates globally with a 66.78% share in 2024, fueled by rapid urbanization and investments in connected mobility solutions

Europe's self-driving bus market is set for explosive growth, valued at USD 1.73 billion globally in 2024 and projected to hit USD 9.34 billion by 2032 at a CAGR of 24.6%, with the region holding a dominant 55.49% share. In 2025, the European segment is expected to reach approximately USD 0.96 billion, driven by stringent emissions regulations, urban sustainability goals, and pilots like full-sized autonomous services in the UK carrying up to 10,000 passengers weekly. Trends emphasize electric integration, safety enhancements, and service mobility, positioning Europe as a leader in low-carbon, driverless public transit innovations.

North America's autonomous truck market is accelerating, with the U.S. segment alone valued at USD 15.67 billion in 2025 as part of the broader global market reaching USD 42.91 billion. Projected to grow at a 10.60% CAGR to USD 86.78 billion by 2032, growth is propelled by driver shortages, logistics efficiency demands, and Level 4 autonomy pilots on interstate routes. Key trends include fuel efficiency gains, strategic partnerships like Daimler with Torc Robotics, and a focus on medium- and heavy-duty electric models for freight transport.











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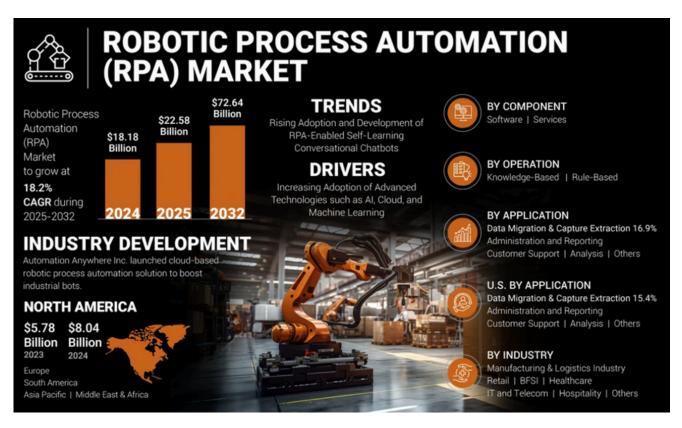
Logistics and Manufacturing





### LOGISTICS AND MANUFACTURING

The logistics and warehouse automation sector is at the forefront of a transformative era, propelled by rapid advancements in AI and robotics that are redefining supply chain efficiency, resilience, and scalability. As global e-commerce volumes continue to escalate—projected to surpass \$8 trillion by 2027—businesses are compelled to adopt automated systems to handle surging demand for faster, more accurate order fulfillment while mitigating challenges like labor shortages, rising operational costs, and supply chain disruptions. Alpowered robotics play a pivotal role here, enabling intelligent decision-making through predictive analytics, machine learning for route optimization, and autonomous systems that adapt in real-time to dynamic environments. This integration not only boosts throughput by up to 30-50% in high-volume warehouses but also enhances sustainability by optimizing energy use and reducing waste in material handling. Broader economic trends, including the push toward nearshoring and resilient supply chains post-pandemic, further amplify the need for automation. For instance, labor shortages in logistics have intensified, with estimates showing a global deficit of over 2 million workers by 2030, driving companies to invest in cobots and AI-driven inventory systems that minimize human error and improve worker safety. Moreover, the rise of omnichannel retail and just-in-time manufacturing demands seamless integration of robotics with IoT and cloud computing, creating ecosystems where data flows in real-time to forecast demand and prevent bottlenecks.



Market projections underscore the immense growth potential: the global warehouse automation market is estimated at USD 29.91 billion in 2025, poised to reach USD 63.36 billion by 2030, growing at a CAGR of around 16%. This expansion is mirrored in the logistics robotics segment, valued at over USD 15 billion in 2024 and expected to climb to USD 61.13 billion by 2034, with a CAGR of 15.6%, as AI enhancements enable more sophisticated applications like swarm robotics for collaborative tasks. The AI in warehousing market adds another layer of opportunity, forecasted to grow from USD 13.41 billion in 2025 to USD 135.25 billion by 2035, at a staggering CAGR exceeding 26%, driven by applications in predictive maintenance and automated quality control. These figures highlight a total addressable market (TAM) that could exceed \$200 billion across related subsectors by the mid-2030s, fueled by regulatory support for green logistics and technological convergence with 5G and edge computing.

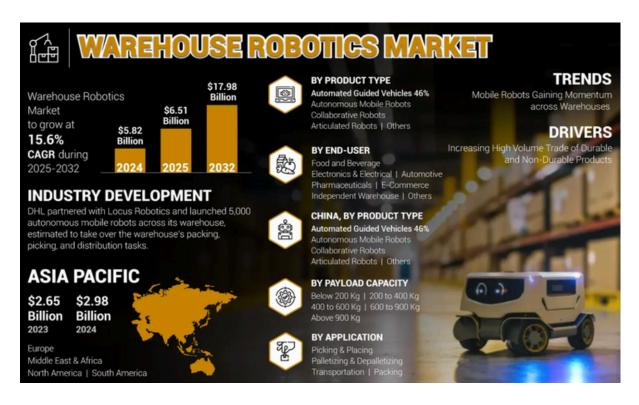




### LOGISTICS AND MANUFACTURING

Investors eyeing this theme benefit from its defensive qualities—automation thrives in both boom and bust cycles—as well as its alignment with megatrends like digital transformation and ESG priorities. However, risks such as high initial capex, cybersecurity vulnerabilities in connected systems, and geopolitical tensions affecting semiconductor supply chains warrant careful consideration. Overall, this sector represents a high-conviction play on the Fourth Industrial Revolution, where AI robotics not only automates routine tasks but also unlocks new efficiencies in global trade networks.

Amid this backdrop, Teradyne (TER) emerges as a key innovator, leveraging its expertise in automated test equipment to expand into robotics via Universal Robots. TER's cobots excel in flexible warehouse applications, such as precise picking and packaging, bolstered by AI integrations for adaptive learning. Recent developments, including a deepened partnership with Nvidia for AI-accelerated robotics and recognition as TSMC's 2025 OIP Partner of the Year for advanced testing solutions, position TER to capitalize on semiconductor-driven automation demands. With ongoing collaborations potentially including major e-commerce players like Amazon, TER is primed to address labor gaps in precision-intensive environments.



Zebra Technologies (ZBRA) complements this with its focus on enterprise intelligence, offering RFID, scanners, and Al-optimized systems for end-to-end supply chain visibility. The company's 2025 acquisition of Elo Touch Solutions for \$1.3 billion enhances touchscreen interfaces for frontline operations, while its collaboration with Tulip delivers mobile-first solutions that boost workflow automation. Zebra's insights, such as studies showing up to 40% productivity gains in logistics through automation, underscore its value for complex third-party providers.

Pairing TER and ZBRA provides diversified exposure: TER's hardware prowess in robotics pairs with ZBRA's software-driven optimization. As the AI robotics warehousing market surges toward \$100 billion by the early 2030s, these stocks offer robust growth potential, though investors should track economic headwinds like inflation or trade barriers. This thematic duo embodies the lucrative intersection of AI, robotics, and logistics evolution





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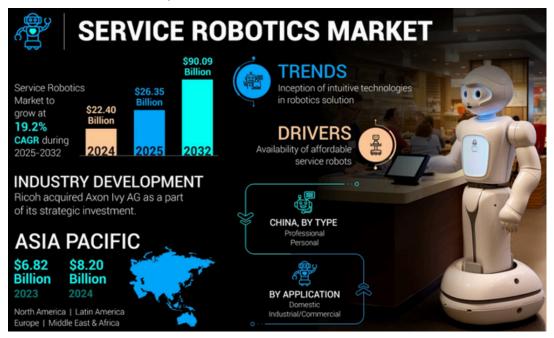
Co-Bots and Humanoid Robots





## **CO-BOTS AND HUMANOID ROBOTS**

Collaborative robots (co-bots) and humanoid robots represent two dynamic segments in the robotics ecosystem, blending AI with physical automation to address labour shortages and efficiency demands. Co-bots are designed for safe human-robot interaction, featuring lightweight arms with sensors for tasks like assembly and picking. Humanoid robots, with bipedal, anthropomorphic designs, aim for versatility in unstructured environments. Both are pivotal in the "Fourth Industrial Revolution," where AI enables adaptive behaviours, but they differ in maturity: co-bots are widely deployed, while humanoids remain largely prototypical. Applications for co-bots span manufacturing, logistics, and healthcare. In manufacturing, they handle precision tasks such as welding, gluing, and component assembly, often in automotive and electronics sectors, reducing errors and boosting productivity by 20-30%. In logistics, they excel in warehouses for order fulfillment, sorting, and material handling, integrating with automated guided vehicles (AGVs) to cut delivery times.



Healthcare applications include patient assistance, such as lifting or dispensing medication, enhancing safety in eldercare amid aging populations. Humanoid robots, still emerging, target general-purpose roles: repetitive factory tasks, hazardous environments like disaster response, and potential consumer uses in homes for chores. Examples include prototypes for tool handling in factories or inspecting construction sites. Their bipedal mobility suits dynamic spaces, but high costs limit broad adoption to pilots in 2025. The total addressable market (TAM) for these segments is expansive, with significant growth projected. For cobots, estimates vary but show robust expansion: The global collaborative robot market is valued at approximately \$1.42 billion in 2025, projected to reach \$3.38 billion by 2030 at an 18.9% CAGR, driven by Al advancements and SME accessibility. More optimistic forecasts peg it at \$5.58 billion in 2025, surging to \$71.26 billion by 2034 amid e-commerce booms. China leads volume growth, with 20.6% shipment increases expected in 2025, reaching 125,000 units by 2029. Humanoid robots, though nascent, have a TAM of \$2.92 billion in 2025, forecasted to hit \$15.26 billion by 2030 at a 39.2% CAGR, fueled by AI integration and labor market disruptions. Longer-term projections are ambitious: \$38 billion by 2035, or even \$5 trillion by 2050 including supply chains, as humanoids target a \$20 trillion labor replacement opportunity. Combined, co-bots and humanoids could exceed \$60-212 billion by 2035, per aggregated industry data, with humanoids offering asymmetric upside despite technological hurdles.





## **CO-BOTS AND HUMANOID ROBOTS**

Symbotic (SYM:NYSE), focused on logistics automation, excels in Al-powered robotic systems that border co-bot functionalities, emphasizing warehouse efficiency. Its strengths include end-to-end solutions like BreakPack for each-handling, reducing labor needs and operating costs through Al-optimized picking and sorting. In 2025, Symbotic's innovations outperform humanoids in reliability and cost for manufacturing and retail, with 25%+ revenue growth via partnerships like Walmart. While not purely humanoid, its mobile robots integrate co-bot arms for agile fulfillment, capturing e-commerce-driven TAM growth Intuitive Surgical (ISRG:NASDAQ) leads in healthcare robotics with its da Vinci platform, leveraging Al for precise, minimally invasive surgical procedures. In 2025, the da Vinci system emphasizes enhanced dexterity, real-time imaging, and surgeon-robot collaboration, addressing an estimated 8 million annual soft tissue procedures. The company's edge lies in dominating the robotic-assisted surgery market, with



innovations reducing recovery times and complications, positioning it for growth in hospitals worldwide. The surgical robots market, where ISRG holds a commanding share, is projected at \$13.32 billion in 2025, growing to \$42.21 billion by 2032 at a 17.9% CAGR, driven by aging populations and demand for advanced medical technologies

Together, these companies highlight the sector's potential: Symbotic drives logistic precision, and Intuitive Surgical enables seamless healthcare collaboration. As TAM expands amid geopolitical and demographic shifts, investments here promise transformative returns, though risks like regulatory hurdles persist





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# MPC MARKETS INVESTMENT SOLUTIONS



## **SERVICES**

#### **Our services:**

- **ASX and US Stock Recommendations:** Our high-conviction services cover ASX small-caps, growth, income & balanced, and mining sectors, alongside US & global opportunities.
- **Portfolio Management:** We help investors mange their portfolios and manage risk in times of high volatility
- **Investor Education:** Empower yourself with our comprehensive programs, including workshops, webinars, and resources on market dynamics, risk management, and structured products.
- **Timely news and content:** Research, and Analysis: Access in-depth reports, real-time analysis, and thematic insights via our proprietary research platform, helping you egt what you need to know, when you need to know it
- **Structured Investment Solutions:** Bridge stocks and bonds with Fixed Coupons for yield enhancement (up to 14.3%) and IndexPro for amplified upside (1.2x S&P 500, 6% outperformance) over 5-year terms, prioritizing capital protection.

# HIGH CONVICTION RECOMMENATIONS

Win Rate	78%
Best Performer	160%
Worst Performer	-25%
Performance of all Picks (annualised)	26%
ASX200 Index over same Period	12%

# ALPHA RECOMMENDATIONS

Win Rate	71%
Average Win	20%
Average Loss	-15%
Best Pick	43%
Worst Pick	-33%

### 2024-2025 ENHANCED GROWTH STRATEGIES



September 2024
STORE OF VALUE+ (12-Months)

Gold and Silver investment \$10k for \$100k notional exposure



June 2025
Geopolitical investment (2-Years)

Platinum & Silver investment \$18k for \$100k notional exposure



## 2024-2025 FIXED COUPON NOTE DEALS Average Yield 12.23%pa



August 2024

**REIT Fixed Coupon Note - 10.1%** 



October 2024

Income+ Fixed Coupon Note - 11.65%



February 2025

ASX Diversified Fixed Coupon Note - 11.2%



April 2025
ASX Diversified Fixed Coupon Note - 13%



April 2025

ASX Diversified Fixed Coupon Note - 13.08%



May 2025

ASX Diversified Fixed Coupon Note - 13.04%



June 2025

ASX Diversified Fixed Coupon Note - 11.43%



July 2025

ASX Diversified Fixed Coupon Note - 14.30%

3-Year Investments, early exit after 6-months, coupons paid quarterly in cash

# MPC MARKETS INVESTMENT SOLUTIONS



### **WHO WE ARE**

#### Who We Are

MPC Markets, founded in 2023 by directors Mark Gardner and Kai Chen, with the aspiration of leveraging their professional trading backgrounds to offer a quality advisory service that was in the best interest of the investor

Based in Australia, we are committed to delivering professional, and client-focused financial guidance. Our "Client First" philosophy ensures that every decision is made with your best interests in mind, delivering well-informed advice you can trust.

#### **Our Founders**

- Mark Gardner: A seasoned broker with over two decades of experience, Mark was the Founding
  president of the Australian Securities Traders Association for over a decade, was Head Trader,
  Chairman and Director of Genesis Trading. Mark has been continuously qualified as a broker since
  late 1996 and his extensive expertise drives MPC Markets' commitment to excellence.
- Kai Chen: With 15 years in financial markets as an analyst, trader, and algorithmic strategy
  developer, Kai brings a wealth of knowledge to MPC. Holding a finance degree with a specialisation
  in actuarial studies, he is also a fully qualified and licensed broker, having completed all required
  exams.

#### **Our Team**

Our team comprises four experienced advisors, including Mark Gardner, Kai Chen, Jonathan Tacadena, and Richard Nader, with a collective 70+ years in the financial industry.

Each advisor has professionally traded their own funds at various stages, giving them unique insight into the markets.



Kai Chen



**Mark Gardner** 



Jonathan Tacadena

We set out to build something that was in the best interests of the INVESTORS,
Not run by salespeople

Mark Gardner - Founder and CEO

TRUSTED ANALYSIS FOR:



The Sydney Morning Herald
THE AGE



















## Glossary



- Artificial Intelligence (AI): The simulation of human intelligence processes by machines, especially computer systems, including learning, reasoning, and self-correction.
- **Automation:** The use of technology to perform tasks without human intervention, enabling increased efficiency and scalability in processes like manufacturing and logistics.
- Autonomous Mobile Robot (AMR): Robots that can understand and move through their
  environment without being overseen directly by an operator, often used in warehouse
  automation and logistics sectors.
- Collaborative Robot (Co-bot) Robots designed for direct interaction with humans in a shared workspace, typically lightweight, sensor-equipped, and able to assist with tasks like assembly and material handling.
- Compound Annual Growth Rate (CAGR): A useful measure of growth over multiple time periods, representing one of the most accurate ways to calculate and determine returns for anything that can rise or fall in value over time.
- **Embodied AI:** Artificial intelligence that is integrated with physical machines or robots, enabling adaptive and intelligent responses to the environment.
- Fully Self-Driving (FSD): Technology enabling vehicles to navigate autonomously using advanced AI, machine vision, and sensor fusion, aimed at reaching high levels of driverless autonomy (e.g., Level 4 or 5).
- **Humanoid Robot:** A robot designed with a human-like body structure and movement, targeting tasks requiring versatility and human-like adaptability, including future applications in homes and hazardous environments.
- Intelligent Transportation System (ITS): Advanced applications that aim to provide innovative services relating to different modes of transport and traffic management, enabling users to be better informed and make safer, better coordinated, and 'smarter' use of transport networks.
- **Logistics Automation:** The application of computer software or automated machinery to improve efficiency in the movement, storage, and processing of goods within the supply chain.
- Machine Learning: A subset of Al involving the use of algorithms that parse data, learn from it, and then apply what they have learned to make informed decisions.
- **Robotic Process Automation (RPA):** Technology that allows anyone to configure computer software, or a "robot," to emulate and integrate the actions of a human interacting within digital systems to execute a business process.
- **Sensor Fusion:** Combining data from multiple sensors for more accurate, useful, and reliable information, often used in robotics and self-driving technologies.
- **Swarm Robotics:** The use of multiple robots that coordinate to achieve a common goal, inspired by collective behaviors observed in nature, such as flocks of birds or colonies of insects.
- **Total Addressable Market (TAM):** The overall revenue opportunity available or the total market demand for a product or service.



## Disclaimer



#### **Our Commitment**

recommendations, managed and presented by MPC Markets Pty Ltd (ABN 33 668 234 562), as a Corporate Authorised Representative of LeMessurier Securities Pty Ltd (ABN 43 111 931 849) (LemSec), holder of Australian Financial Services Licence No. 296877, offers insights and analyses formulated in good faith. Our evaluations and projections are grounded in the known facts at the time of creation and aim to provide a comprehensive view of the anticipated financial landscape in 2024. However, readers should be aware that these projections are estimates and may not fully materialize.

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