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Jim Jubak

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Posted 4/4/2006

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## Jubak's Journal

# 5 reader picks for tech's next big thing

Ultracapacitors, new memory chips and power converters are just some of the new technologies that readers suggest might reshape the future. advertisement

By [Jim Jubak](#)

A little more than a month ago, I wrote a column about finding "[the next big thing](#)" in technology. The next big thing, I argued, would be a disruptive technology that changed the existing game and sent rivals to the scrap heap.

I picked seven "next big things":

- The "Cell" microprocessor;
- The home-entertainment gateway;
- The home-entertainment hub;
- Internet telephony over mobile phones;
- Electronic networked health-care

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records;

- Mapping everywhere;
- Batteries.

And I suggested that readers send me their own picks for the next big thing. If I got enough, I'd put them together into a follow-up column.

### The best from a deluge of entries

Well, of course, since Jubak's Journal readers are the shrinking violets they are, I was buried under heated nominations that often began "How could you leave out..." Here are the best of the bunch from that reader mail -- five more, to be exact.

I have not vetted any of these ideas, and readers should

certainly not regard them as picks in any way. I see this effort, like that of my Feb. 24 column, as brainstorming.


I have, however, checked to make sure that there is a public way to invest in each idea, and that none of these stocks are such microcaps that a

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## Jubak's Journal

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mention from me here would be easily manipulated by speculators. Lastly, I have provided some basic information that you might need to begin your own research.

The ideas offered here and the earlier column are intended to spark creative thinking that will lead to more ideas and, finally, after research and due diligence, to a stock or two you might want to buy. This column, like the earlier one, is just Step 1 in that process.

- **The ultracapacitor.** "In response to your recent article 'The 7 next big things in tech,' a good candidate for a disruptive technology is the ultracapacitor. Take a look at **Maxwell Technologies** ([MXWL](#), [news](#), [msgs](#)). Maxwell is a member of the [Hybrid Consortium](#), and Maxwell is included in the **PowerShares Wilderhill Clean Energy ETF** ([PBW](#), [news](#), [msgs](#)).

Ultracapacitors are replacing or supplementing batteries in many applications from hybrids to fuel cells to automatic meter-reading devices." -- Joe.

- [5 ways to face our nation's Wimpy mentality,](#)  
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Ultracapacitors are devices that store energy but in much greater quantities than batteries. Maxwell Technologies began life in 1965 as government contractor Maxwell Laboratories. The company, headquartered in San Diego, now generates all of its revenue -- \$45 million in 2005 -- from commercial customers. The stock has a market capitalization of \$330 million. ([Click here](#) to go to the company's Web site.)

- **Nanotube memory chips.** "I just read your article, and I'd submit the following disruptive technology. I'm in the semiconductor business, and I think the upcoming bottleneck out there is memory. Nantero is a company that has found a way to use existing semiconductor manufacturing processes and add carbon nanotubes to create a memory device that is three times more dense than any existing technology. It is like flashing memory (like the little USB "thumb" drives), but with storage sizes 1,000 times larger than existing hard drives. It is also nonvolatile, meaning it does not need to have constant power applied to it to maintain the memory states. To complete the scorecard, it is also as fast as existing DRAM memory technology." -- Mike.

Nantero is still a private company, but investors can own a piece of it through the publicly traded **Harris & Harris Group** ([TINY](#), [news](#), [msgs](#)) nanotech portfolio (market capitalization \$290 million). Nantero has so far raised \$31 million in private investment from venture capital firms that include Charles River Ventures and Draper Fisher Jurvetson. To see the company's Web site, [go here](#).

- **High-density power converters.** "I have a potentially disruptive technology company for you to look at. **Vicor** ([VICR](#), [news](#), [msgs](#)) has come out with a new power converter that converts and manages electric power more efficiently and with higher power densities than ever before. **Sony** ([SNE](#), [news](#), [msgs](#)) has licensed the technology from Vicor, and, I believe, the technology is also being used in conjunction with the new Cell microprocessor that is being made by **IBM** ([IBM](#), [news](#), [msgs](#)), Sony and **Toshiba** ([TOSBF](#), [news](#), [msgs](#))."-- Fletcher.

Vicor, based in Andover, Mass., recorded \$180 million in sales in 2005, and the company will earn 34 cents a share in 2006, according to the consensus of the three analysts that follow the

stock. The stock has a market capitalization of \$830 million. That may seem steep for a stock with \$180 million in annual sales, but the analyst consensus is projecting 50% annual earnings growth for Vicor over the next five years. Check the company's Web site [here](#).

- **Global positioning on silicon.**

"Before anyone can use the map produced by the companies you mentioned in your column, **Tele Atlas** ([TLATF](#), [news](#), [msgs](#)) and **Navteq** ([NVT](#), [news](#), [msgs](#)), one needs to know its current location. I believe **SiRF Technology Holdings** ([SIRF](#), [news](#), [msgs](#)) is the only GPS technology enabler in this field." -- Amin.


For those who don't know what SiRF Technology does, let me paraphrase the [company description](#) on our site: SiRF Technology Holdings is a supplier of global positioning system (GPS) semiconductor solutions designed to provide location awareness capabilities. The company's chip sets and software use the GPS satellite system in orbit around the earth to tell products such as cell phones and cars where they are

on earth. The chip sets can include two integrated circuits, a radio-frequency integrated circuit and a digital-signal processing circuit -- and standard embedded GPS software.

Founded in 1995, the San Jose company now has a market capitalization of \$1.8 billion and had \$170 million in sales in 2005. The nine analysts that follow the stock project 32% annual earnings growth over the next five years. Those same analysts project that the company will earn 83 cents a share in 2006. Click [here](#) to visit the company's Web site.

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