

EPISODE
421



**INVESTING IN THE
NEXT WAVE OF
AUTOMATION**

HOSTED BY
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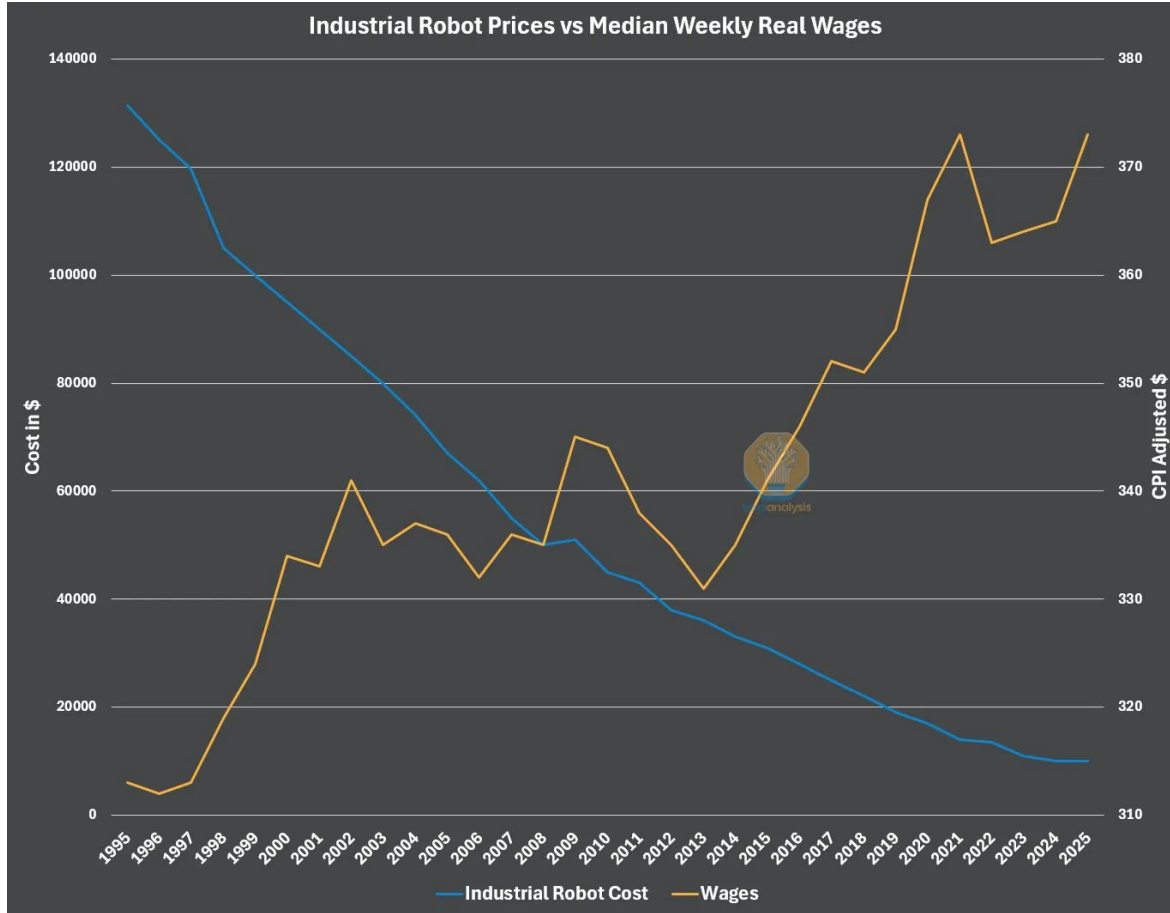
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Contents:

- About the market
- Unitree
- Chinese domination? Tesla vs BYD
- Another wave of disruption:
 - AI
 - Energy / electrification
 - Driverless cars
 - Robotics

Contents:



Levels of Autonomy: 0 Scripted Motion



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Medium-Scale BIW Assembly Line ROI vs Labor (Annualized)					
Automated			Labor		
	Unit	Cost		Unit	Cost
CapEx		\$15,000,000	CapEx		\$1,800,000
Industrial Arms (50) and Tools	\$	\$8,000,000	Tools	\$	\$1,800,000
Integration	\$	\$7,000,000			
OpEx	\$	\$3,300,000	OpEx		\$12,000,000
Technicians (10)	\$	\$1,000,000	Workers	#	200
Maintenance and Parts	\$	\$1,200,000	Labor	\$	\$12,000,000
Additional Utilities and Overhead	\$	\$1,100,000			
Total Cost	\$	\$18,300,000	Total Cost	\$	\$13,800,000
Operating Cost	Cost per Job	\$41	Operating Cost	Cost per Job	\$150
Annual Savings			\$8,700,000		
ROI			58%		
Payback Period (Years)			1.72		

Levels of Autonomy: 1 Pick & Place



Levels of Autonomy: 2 Autonomous Mobility



Levels of Autonomy: 3 Low-Skill Mobile Manipulation

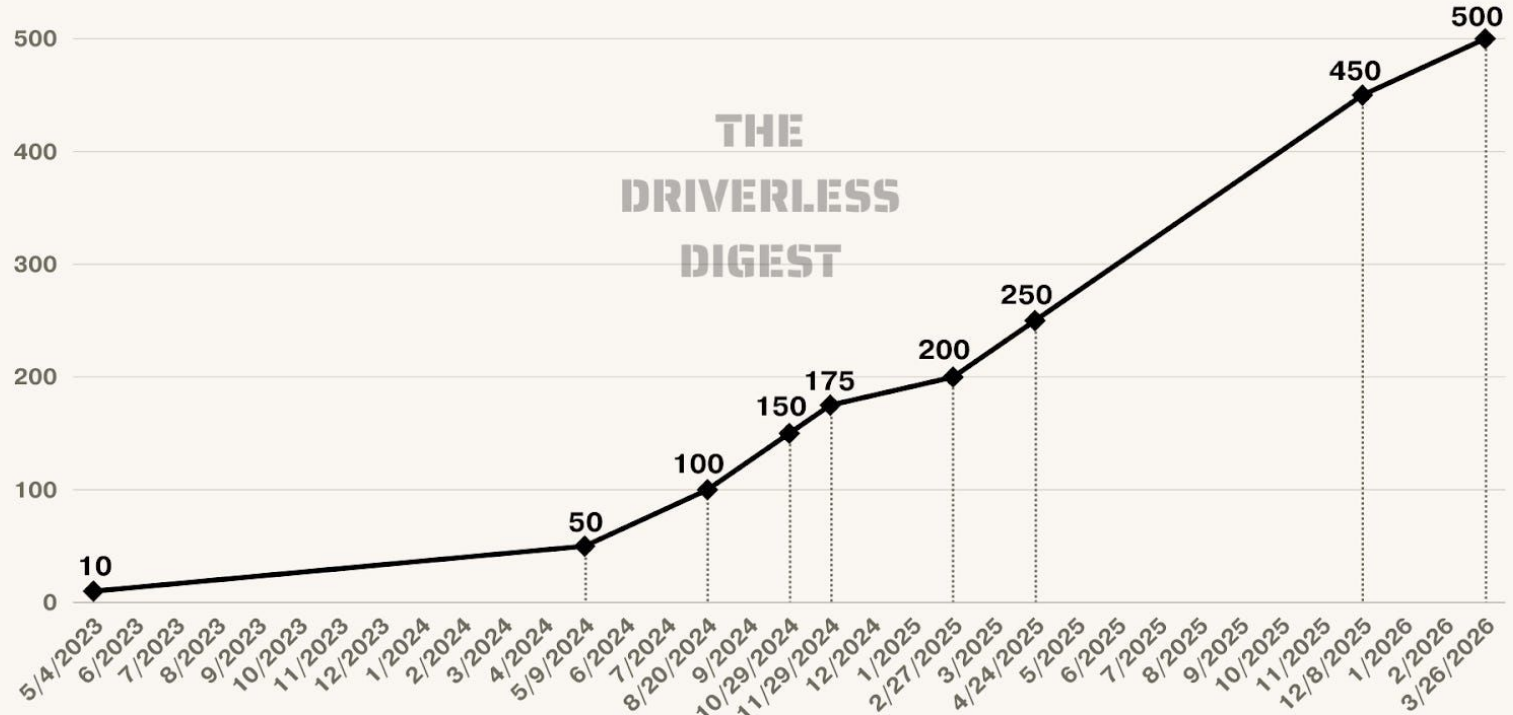


Levels of Autonomy: 4 General Purpose



Driverless cars: Around the corner in 2017

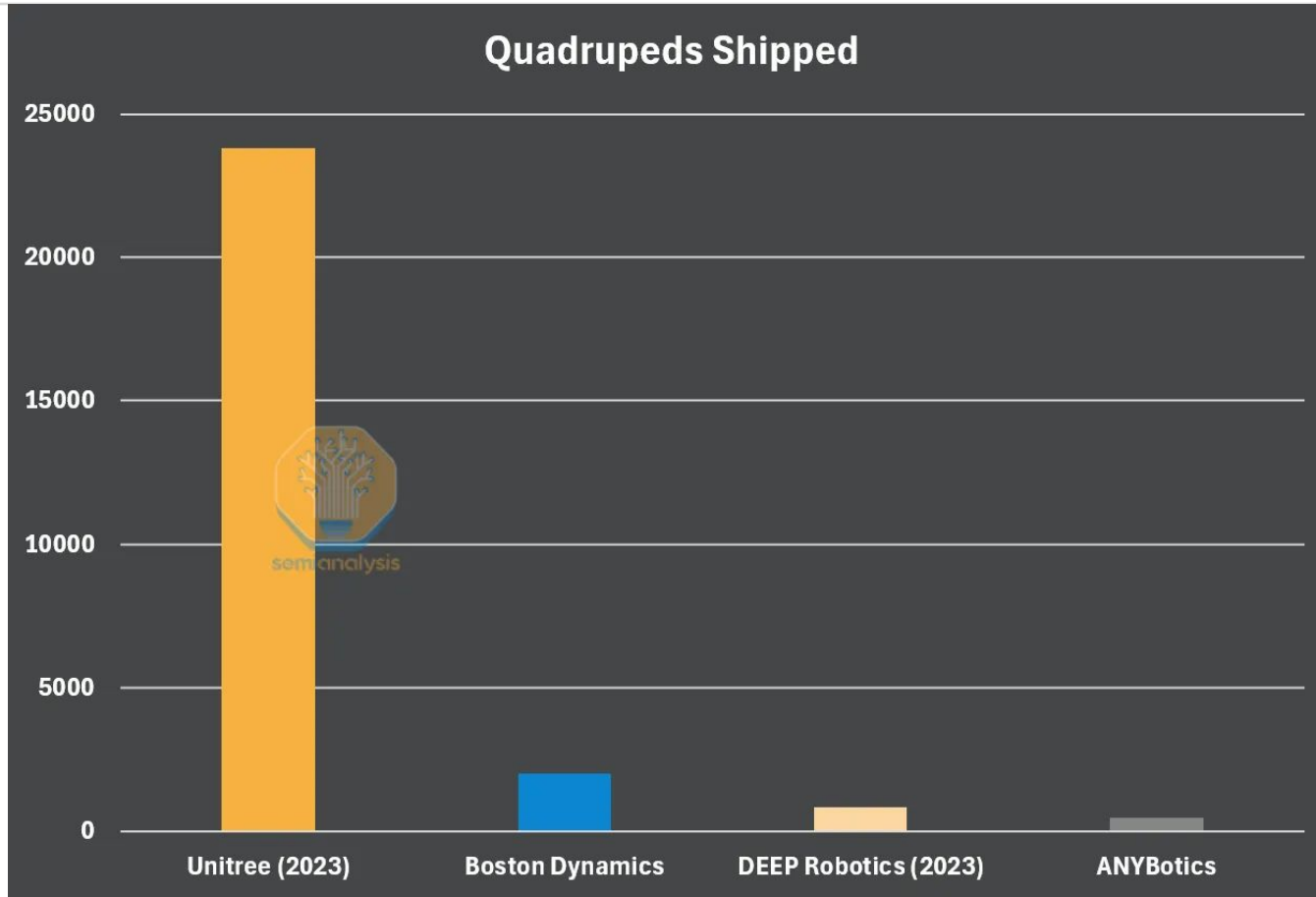
Waymo #Weekly Trips (in thousands)



Quadrupeds: Live today



Quadrupeds: Live today



Unitree: Listing shortly



Unitree:

- Listing shortly
- <https://www.unitree.com/H2>
- Retail Cost: \$27,000 with 60%+ margins
- Actual cost \$9,000
- Game changer?

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