SPECIAL REPORT

The Next Big AI Trade

Nine Stocks to Profit from the "Agent Supernova"

Brian Hunt's
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In November 2025, an Austrian named Peter Steinberger introduced a revolutionary AI program, now called OpenClaw, that took the world by storm.

OpenClaw is an AI "agent" that can autonomously manage online payments, make restaurant reservations, manage your schedule, send emails for you, and manage other AI agents that work for you.

It is the best "AI helper" invented so far.

Nvidia CEO Jensen Huang has called OpenClaw perhaps the most important software release in history. OpenAI quickly paid Steinberger a fortune to "acquire" him.

AI developers are in a mad dash to replicate and improve upon what OpenClaw does. Soon, Google, OpenAI, and Apple will roll out their own AI assistants, bringing this revolution to hundreds of millions of people.

Many tech experts believe OpenClaw and programs like it are poised to produce a megatrend we at *Money & Megatrends* call the "Agent Supernova."

The Agent Supernova is set to transform how our lives and economies function. It will break and reform many businesses, industries, and societal norms.

Think of our $125 trillion global economy as a long, elegant dining table with hundreds of pieces of silverware and glassware, each taking decades and trillions of dollars to build.

The Agent Supernova is going to pull the tablecloth out from under it all.

The population of America is roughly 342 million people. The Agent Supernova is about to introduce billions of "AI workers" into our economy to perform all kinds of roles.

Soon, a restaurant could have five different agents working in it. One agent to manage the cooking schedules of meals. One agent to manage accounting. One agent to manage the staff. One agent to manage the ordering and tracking of supplies. One general-purpose agent to manage the specialized agents and interact with the restaurant owner.

A "mom helper" agent could schedule dentist appointments for the kids, pay bills, renew the car insurance, order groceries, and remind the kids to do their homework.

A factory could have agents managing logistics, accounting, production schedules, component part ordering, hiring and firing workers, and other critical functions.

Now, take those three examples and extrapolate them across the entire economy. We are on the cusp of an explosion of agents working 24/7 for individuals, businesses, and governments.

In addition to restaurant manager agents, mom agents, and factory management agents, we will soon interact with legal agents, government agents, tax agents, teacher agents, negotiator agents, airport agents, hospital agents, writing agents, marketing agents, and more.

Within the next two years, the number of AI agents operating in the American economy isn’t poised to increase by 10X… or 50X… or even by 1,000X. Try at least 100,000X.

This is the coming Agent Supernova. Agents working with people. Agents working with other agents. Agents running businesses. Agents negotiating and haggling with other agents. And all this with very little day-to-day human oversight.

The economic deck is about to get reshuffled. The Agent Supernova will transform many businesses and industries, and end many as we know them… while creating new ones.

The bigger the impact a megatrend can have on our world, the bigger the capital gains it can generate in your portfolio. This is why the Agent Supernova is such a big opportunity.

In this report, we’ll detail three distinct themes you can invest in to profit from the coming Agent Supernova.

Agent Supernova Opportunity #1: Invest in the coming surge of AI web traffic

Agents work much faster than humans. They don’t take breaks or vacations. That means just one AI agent can search for information and transact at the speed of light. An explosion of agent usage will generate an explosion of internet traffic.

Companies poised to benefit from this explosion of traffic include:

Cisco (CSCO): CSCO is a $323 billion company that has risen 32% over the last year and just set a new 21-day high. CSCO benefits massively in the agentic world because they sell the equipment that lets data move. CSCO provides switches (which move data between machines within a data center) and routers (which move data across networks). As AI becomes more agentic, CSCO’s infrastructure keeps these systems connected.

Ciena (CIEN): CIEN has risen 79% YTD to a $62 billion market cap, but demand for its products is only just getting started. CIEN provides optical networking equipment that enables data to move at very high speeds over long distances. CIEN is one of the leaders in the optical space along with Lumentum (LITE) and Applied Optoelectronics (AAOI).

Akamai Technologies (AKAM): AKAM helps to route, optimize, and secure traffic rather than physically enabling capacity for that data to exist. It benefits massively from higher usage, so this could be an interesting stock to watch as well, with a market cap of just $17 billion today. We think of it as more of a secondary beneficiary of the wider trend… and a lot of the time, these are the stocks that move more, since they're much less known at the start.

Agent Supernova Opportunity #2: An explosion of agents will produce an explosion of cybersecurity work

If we're going to have millions of AI agents performing billions of daily tasks 24/7 in health care, education, energy, transportation, manufacturing, and technology, then we're going to have billions of points of cybercrime vulnerability. And remember, crooks get to use AI too.

If agents can roam the web, communicate for you, log in to your apps, move money, and modify data at machine speed, then a compromised agent can do the same damage just as fast – now with far less human oversight to catch mistakes or intrusions.

Traditional cybersecurity models were built for a small, known set of human users following repeatable routines. Agentic AI breaks that assumption. We're moving from managing people at keyboards to managing growing populations of software "workers" that operate continuously and mostly out of sight.

This is why well-positioned cybersecurity companies are poised to enjoy years of booming business. Companies poised to benefit include:

CrowdStrike (CRWD): CRWD is arguably the clearest winner in the agentic AI space. Its Falcon software already sits on millions of laptops and servers, watching everything they do and blocking hackers in real time. Now, CRWD is turning that same platform into a security system for AI agents.

It has launched tools that can find all AI agents within a company, monitor their activity, and shut them down if they start behaving unexpectedly. With a $100 billion market cap and about $6 billion in revenue, CRWD has the distribution and data edge over most competitors, which makes it a much safer bet on this theme.

Palo Alto Networks (PANW): PANW is the broadest, most "full-stack" way to play the agentic AI security theme. Rather than specializing in one niche, PANW is building an AI-driven security platform for the whole enterprise, making it a less risky way to play the theme, like CRWD.

At the same time, PANW is also going after the pure agentic opportunity with AgentiX, a "workforce for autonomous AI agents" that can detect and fix issues automatically. It's also planning to acquire Koi, which is designed to secure the emerging "agentic endpoint" layer.

SailPoint (SAIL): SAIL's CEO just called agentic AI the "single greatest market expansion driver we have ever seen." SAIL focuses on identity security – deciding who or what is allowed to access which apps and data, and ensuring those permissions stay correct over time.

SAIL is a recent IPO (February 2025) with a market cap of about $6 billion and close to $1 billion in annual revenue, making it relatively cheap compared to the bigger players above, while it is tightly aligned with securing non-human and agent identities.

This makes RDWR a strong play in a niche part of the AI stack. Management expects roughly $330 million of revenue in 2026, about 9% growth over 2025.

If you don't feel comfortable picking one (or a few of the above), another way to get exposure to the cybersecurity theme is to buy the **Global X Cybersecurity ETF (BUG)**. This fund owns a diversified basket of cybersecurity stocks.

Agent Supernova Opportunity #3: Why specialized semiconductor stocks are poised to soar

So far in this report, we've highlighted how the Agent Supernova is poised to benefit cybersecurity stocks and communications equipment stocks.

Well-positioned semiconductor makers stand to benefit just as much.

AI agents running "at the edge" inside our phones, cars, homes, offices, schools, factories, hospitals, and airplanes will drive tremendous demand for specialized semiconductors made for those roles.

Companies involved in this theme include:

Amkor (AMKR): Amkor is an $11 billion market cap "picks and shovels" play on the Agent Supernova. It sits at the point where AI chips become usable hardware. It is one of the largest advanced packaging and test houses for high-performance semiconductors, integrating CPUs, GPUs, and HBM into dense, power-efficient AI systems. As agentic AI drives more compute with CPU, GPU, and memory chiplets (as opposed to predominantly GPUs) into very tightly packed 2.5D and 3D packages, AMKR's advanced packaging demand soars.

Advanced Micro Devices (AMD): AMD is a $330 billion semiconductor design firm. It is one of the safest bets on the agentic wave. It's a key player in the GPU space and, along with NVDA, the leader in the CPU space. Its CPUs are already deeply ingrained with hyperscalers like Amazon AWS, Microsoft Azure, and Google Cloud. For reference, in the GPU space, NVDA still completely dominates, but in the CPU space, AMD has now carved out almost 40% market share, suggesting it is set to dominate the next wave.

Marvell Technology (MRVL): MRVL is a $76 billion semiconductor and data infrastructure firm. It designs and sells a wide range of chips and solutions across several key markets, including data centers and edge computing uses.

Summing Up

The Agent Supernova is poised to hit our economy like a tidal wave.

It will create enormous change and opportunity.

The Agent Supernova will transform many businesses and industries, and end many as we know them... while creating new ones. The economic deck is about to get reshuffled.

The bigger the impact a megatrend can have on our world, the bigger the capital gains it can generate in your portfolio.

Investing in web traffic, cybersecurity, and semiconductor companies that will make it all possible is an excellent way to benefit.