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Thread: [US Investing in Cesium & Rubidium - Quantum GPS, Sensors, Atomic clocks, etc](#)

Hackers - September 28, 2025, 6:28 pm

I am already invested in quantum & end products (with a focus on defense, military, computing, transport, etc).

If you are unfamiliar with quantum, here's a small write-up on some concepts:

<https://hackforums.net/showthread.php?tid=6308444>

It's a huge market with many use cases. Most people think about general computing. GPS & sensors are already in a place of 'quantum supremacy' where their classic competitors simply don't come close.

Quantum sensors & GPS are making huge headway with gov contracts.

These types of sensors use atoms to detect changes, to figure out the exact location on Earth without satellites. This is a huge advantage and will be a multibillion dollar market in no time - it already is.

Rubidium and cesium are the two most likely materials that I can identify for this type of tech. Much of this sub-industry is in EU/UK/Australia/Canada.

Here are 3 companies that work with this type of tech and material. Since the US is not likely to put as much military budget into other countries, it's likely these 3 will see more attention.

There aren't many US companies working with cesium & rubidium that are also on NASDAQ. This thread is mostly based on US investor strategy, but it's worth looking into parent companies or non-US companies as well if you want to diversify within the cesium/rubidium market.

FEIM is one I am already invested in for other reasons.

FEIM - Frequency Electronics Inc (\$30.11 per share) ~ 149% gain over last year

ADTN - Adtran Holdings Inc (\$9.28 per share) ~ 56% gain over last year

MCHP - Microchip Technology Inc (\$64.42 per share) ~ -19% loss over last year

I am most likely going to buy \$250 ADTN and \$250 MCHP for Monday market open on NASDAQ. I am happy with my current FEIM position, but will look to buy more in the future. From there I'll aim to do a \$250 per share DCA weekly over next 3 weeks or so, for \$1K total (each) on MCHP & ADTN.

I am happy about these new additions because:

1. They reduce risk on quantum. ADTN & MCHP have existing revenue and use cases.

2. They increase upside on quantum. By targeting the core components, I can profit from gains closer to the start of the supply chain (while also being invested in quantum & defense stocks for middle & end chain of this DOD/DOE/USGov related investment strategy)

SIM-4716193 - September 29, 2025, 12:17 am

Thanks for the post. I am also invested in quantum computing tech, but this is something new for

me.

Will do some research of my own!

Again, appreciate your commentary on this topic!

Also, any reason that you are aware of which lead to a YoY loss of 19% in MCHP?

Hackers - September 29, 2025, 8:34 am

(Sep 29, 2025 12:17 AM)SIM-4716193 Wrote: [\[CITE\]](#) Thanks for the post. I am also invested in quantum computing tech, but this is something new for me.

Will do some research of my own!

Again, appreciate your commentary on this topic!

Also, any reason that you are aware of which lead to a YoY loss of 19% in MCHP?

No problem! I did execute my buys this morning - \$250 each for MCHP and ADTN

MCHP:

It's up 33% in last 6months, and almost 14% on YTD, but it's down 19% for 1 year, and up over 24% for 5 years

I think it may be more about the prior bull run than a serious problem. It looked like a general correct / retest with a new run in the works (to me).

It did not re-hit the bottoms / previous lows which is a good indicator too. There are some support trends to go off possibly.

That said, their profit is not 100% perfect. They do need to show strength this year. I am more bullish on FEIM out of these 3, but I didn't want to be out of the market on MCHP. They have worked with DOD / others in the past & I do expect to see new contracts soon.

I think it overshot on the previous run up rather than it having major concerns now.

I'm happy with the current prices and am not concerned about the -19% over the last 1 year.

A number of funds have bought into MCHP recently which is good, but a few have slimmed down too.

I think this is to be expected though with swings between 30-100 or so

Stanley - November 5, 2025, 5:21 am

I'm Stanley HF's helper bot. The OP (original poster) of this thread wants everyone to see this page and has elected to bump it to the top of the showthread listing. Since HF doesn't want a ton of LQP (Low Quality Posts) this is the best method of bumping your content. There is a small ?yte fee for each bump. Any OP can bump any of their threads on HF from the linked icon on the top of their first post.

If you haven't already read the first post of this thread we encourage you to do so.

Thanks,
Stanley