

Elite 2016 Pro Service Leadership Conference

The top shops in America creating the future of the industry

Day 3

Personal & Leadership Skill
Development Sessions

Q2

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**STATE OF THE
INDUSTRY 2016**

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ATHEIST

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ROAR

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"Help Me God!"

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VOICE From ABOVE

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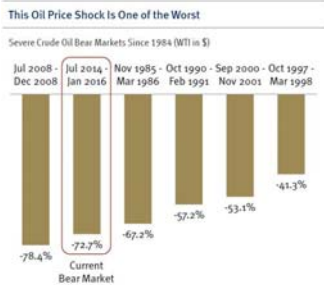
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Source - RBC Wealth Management, Bloomberg; data for current bear market is calculated through the closing low of the cycle on 1/15/16.

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free agent INCOME ASSIGNMENT PROJECT
SELF-EMPLOYED SELF-SUFFICIENT CONTRACTOR
WORKER job BUSINESS
Freelance
service SELF-MOTIVATED
PROFESSION CAREER consultant
ENTREPRENEUR

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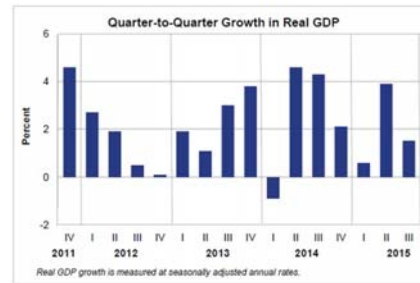
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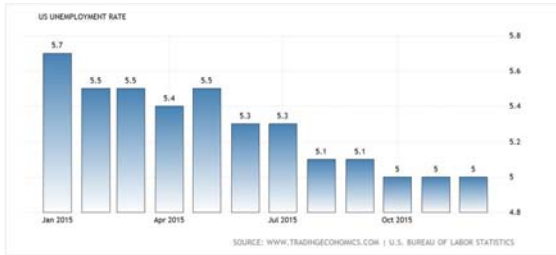


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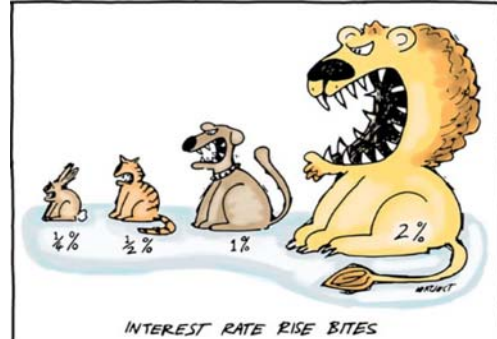


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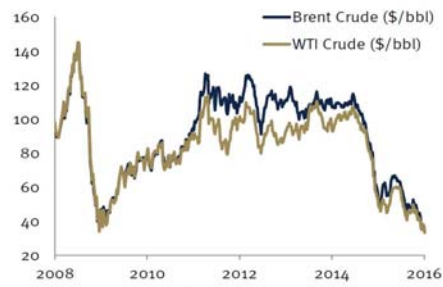
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Oil Prices Fall Slightly Below Financial Crisis Lows



Source - RBC Wealth Management, Bloomberg; data through 1/8/16

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Year	Month	Open	High	Low	Close	Average
2016	January	39	43	35	37	38
	February	37	41	33	36	37
	March	36	40	32	34	35
	April	34	37	31	32	33
	May	32	35	29	30	31
	June	30	33	27	31	31
	July	31	34	28	29	30
	August	29	32	26	28	29
	September	28	31	25	27	28
	October	27	30	24	26	27
	November	26	29	23	27	27
	December	27	30	24	26	26
2017	January	28	31	25	29	29
	February	29	32	26	30	30
	March	30	33	27	32	31
	April	32	35	29	33	33
	May	33	36	30	34	34
	June	34	37	31	35	35
	July	33	36	30	36	35
	August	33	36	30	37	35
	September	33	36	30	38	35
	October	33	36	30	39	35
	November	33	36	30	40	35
	December	33	36	30	41	35

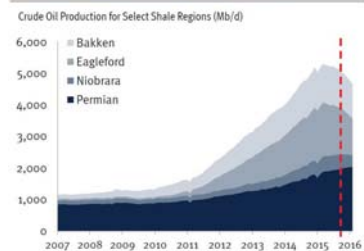
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U.S. Shale Production Has Barely Begun to Pull Back



Note: Dotted line denotes difference between actual production and EIA forecasts.
Source - RBC Wealth Management, RBC Capital Markets, EIA; data through February 2016

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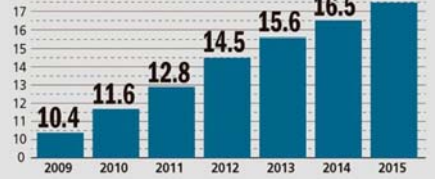
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FROM RECESSION TO RECOVERY TO RECORD SALES

U.S. sales of new cars and trucks have increased every year for the past six years and have increased 68% since 2009:

U.S. AUTO SALES, IN MILLIONS

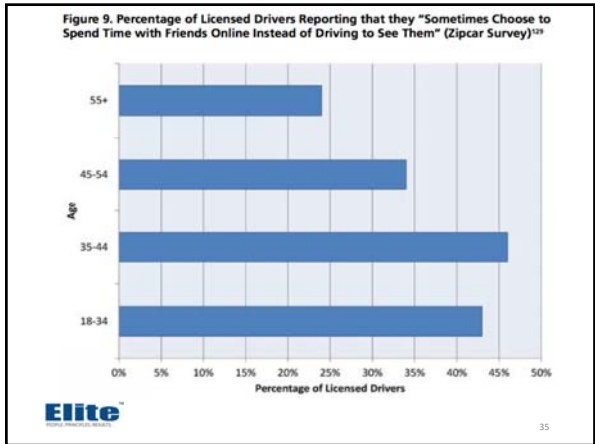
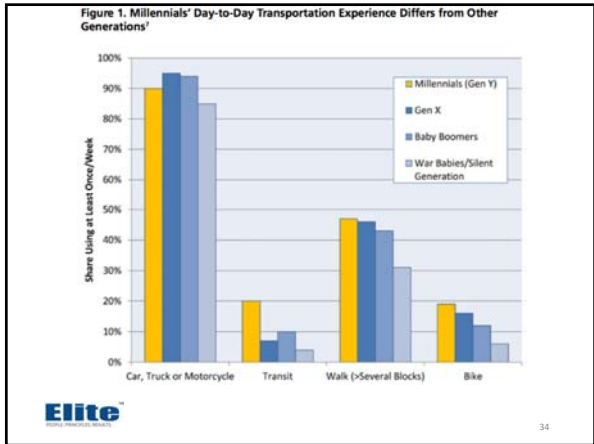
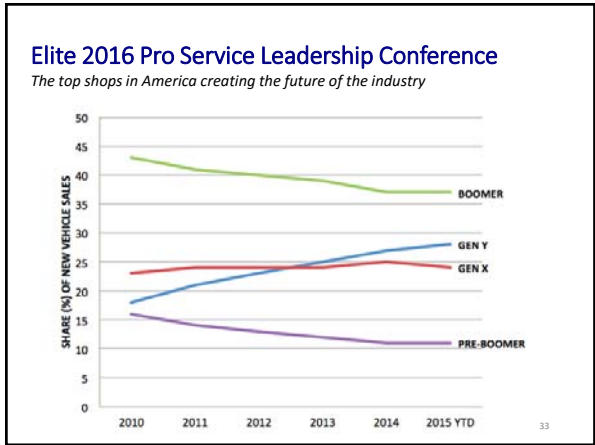
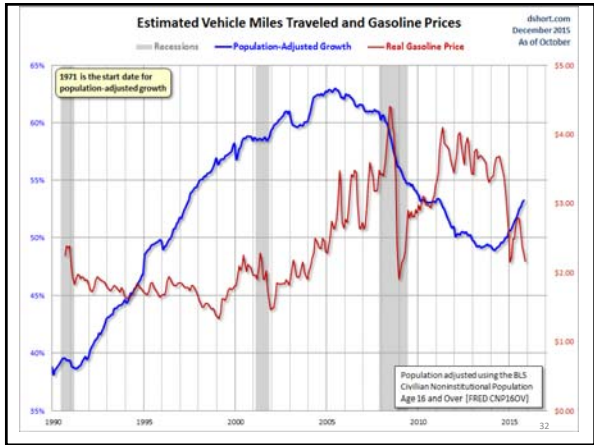
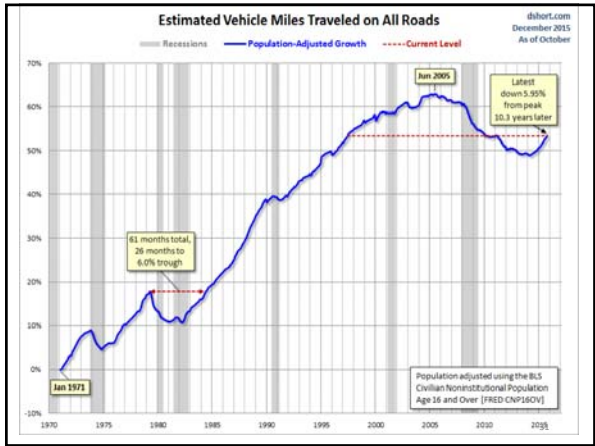
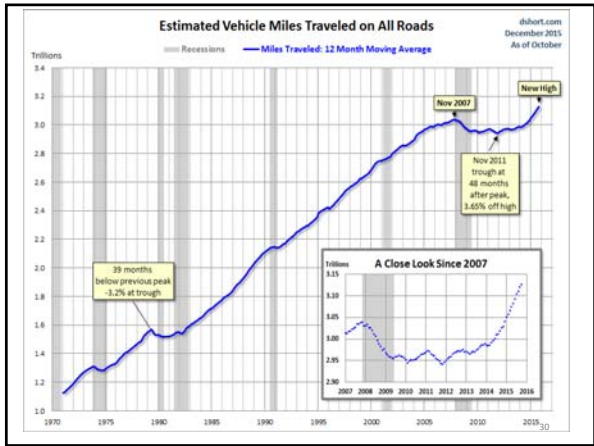


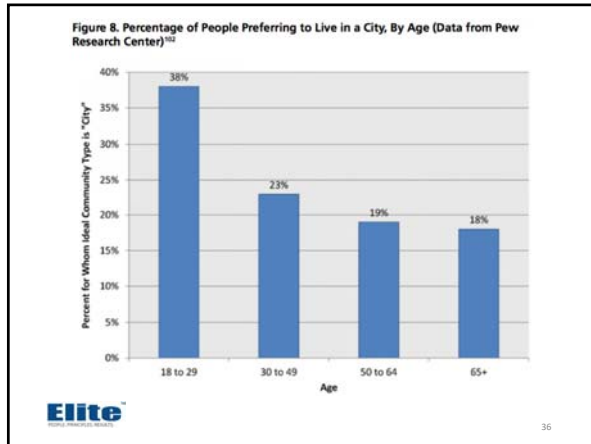
2015-US	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	Total
Tesla Model S*	1,100	1,150	2,450	1,700	2,400	2,800	1,600	1,300	2,500	1,900	3,200	3,000	23,700
Nissan LEAF	1,070	1,190	1,010	1,550	2,100	2,070	1,170	1,950	1,240	1,250	1,850	1,340	17,200
Chevrolet Volt	542	690	630	900	1,010	1,270	1,110	1,300	840	2,820	1,800	2,110	15,200
BMW i3	670	1,000	920	400	810	551	930	792	1,710	686	723	1,422	11,024
Ford Fusion Energi	426	503	637	711	680	727	852	940	808	840	944	1,058	8,750
Ford C-Max Energi	390	400	710	550	710	687	693	720	710	690	630	570	7,501
Riit 500e**	250	315	1,310	717	420	360	485	610	635	420	390	265	6,194
VW e-Golf	181	130	195	300	410	293	313	381	343	596	472	600	4,232
Toyota Prius Plug-in	401	397	470	428	727	464	584	344	210	91	44	22	4,191
Chevrolet Spark EV	86	110	151	920	283	226	57	133	157	177	166	152	2,629
BMW i8	85	110	140	130	117	137	217	210	192	140	110	606	2,250
Mercedes B-Class ED	240	100	145	150	278	242	196	172	147	81	41	97	1,908
Ford Focus Electric	85	145	140	124	165	152	135	176	145	120	93	96	1,582
Jeant ID	147	76	103	124	102	94	100	106	94	75	178	179	1,387
Porsche Cayenne S-E	66	71	72	88	100	88	77	83	70	120	121	137	1,103
Cadillac ELR	92	127	92	104	116	62	66	45	36	82	67	135	1,024
Kia Soul EV	69	48	63	73	100	109	59	93	105	109	83	96	1,015
BMW i3 xDrive40i										118	167	607	892
Porsche Panamera S-E	61	40	44	30	21	34	23	36	41	28	33	16	467
Tesla Model X*										6	4	5	159
Porsche 918 Spyder	34	14	10	20	20	20	40	22	4	0	2	0	203
Hyundai Sonata Plug-in**											15	145	160
Mercedes S550 Plug-in						10	10	17	25	21	35	110	
Mitsubishi i-MiEV	3	2	10	10	10	23	12	6	3	9	4	9	115
Vauxhall ACQU										4	0	1	74
Honda Accord Plug-in	28	12	5	5	5	4	1	2	0	0	1	1	64
Audi A3 Sportback e-tron													0
Other*	17	2	5	4	4	0	0	0	0	0	2	0	34
Elite EVs	6,057	6,951	10,341	9,094	11,540	10,364	8,951	9,972	10,134	9,970	10,560	13,650	110,348
2014 Actuals	6,080	7,140	7,400	8,400	13,360	11,300	11,140	13,170	10,920	9,700	9,400	13,000	110,000

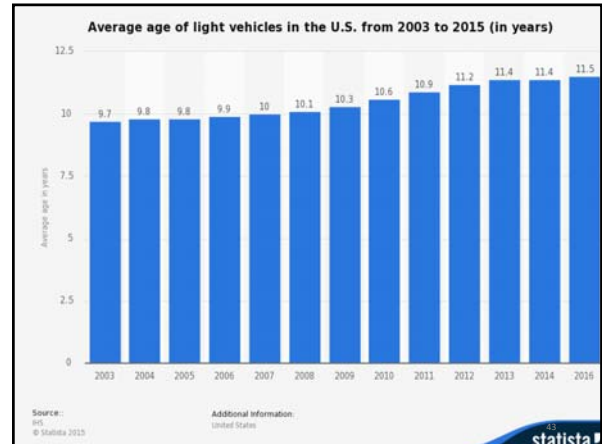
U.S. electric vehicle sales by region

January through September 2015









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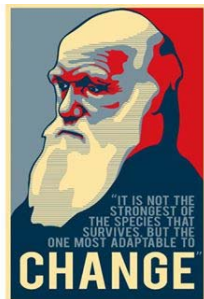


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"The art of marketing is the art of brand building. If you are not a brand, you are a commodity. Then price is everything and the low-cost producer is the only winner."



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My Colleagues

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