

Alex:

New Apple CEO wants to enter AV space through acquisition. Who do they buy?

Reilly:

Uber acquires Lucid and Nuro

Alex:

Should VW buy Rivian?

Reilly:

**Tesla divests its car business,
Mary Barra becomes CEO**

Alex:

What are the consequences of a Chinese company buying Porsche?

Reilly:

Waymo acquires Lyft

Alex:

Soichiro Honda said in the future there will only be 5 car companies, and Morgan. Who are the 5?

Reilly:

**Chinese OEMs enter USA rapidly,
through co-ownership agreements
with Detroit OEMs**