

The 18 Stocks Set to Soar from Trump's Big Beautiful Bill

High-Conviction Picks for the Infrastructure Boom

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Introduction

America's aging roads, bridges, factories, and energy grid have been political talking points for decades — but real, sweeping action has been rare. Now, with President Trump's **“Big Beautiful Bill”** — which includes hundreds of billions for highways and ports, new tax credits for domestic manufacturing, fast-track permits for oil and gas projects, and strict **“Buy American”** rules — we're looking at a historic wave of spending that could transform not only America's physical landscape but entire segments of the stock market.

At Global Market News, we believe smart investors should know exactly which sectors stand to benefit — and which companies are best positioned to capture the coming trillions in spending.

This eBook does exactly that. Inside, you'll find **18 companies**, carefully selected and explained, that stand at the front of this infrastructure revival: from bulldozers and steel to pipelines, housing, and even crypto hedges.

Use this guide as a starting point to build your watchlist, research ideas, and plan your next move as this massive spending cycle unfolds.

Let's get into it.

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1–5: Big Infrastructure & Heavy Equipment

Caterpillar Inc. ([CAT](#))

Caterpillar sells bulldozers, excavators, and loaders — the literal iron used to build highways, bridges, and airports. If the government throws hundreds of billions at “shovel-ready” projects, contractors order more gear. CAT’s earnings historically soar when big capital projects ramp up.

Deere & Co. ([DE](#))

Deere is best known for tractors, but its Construction & Forestry division makes earthmovers, backhoes, and graders — the same gear used on roads and site prep. Plus, more rural infrastructure means more farm investment too. It’s a double play: agriculture plus construction.

Fluor Corp. ([FLR](#))

One of the largest engineering, procurement, and construction firms in the world. Governments hire Fluor for entire highways, pipelines, and refineries — from design to delivery. Big federal contracts translate to a robust backlog and revenue pipeline.

Jacobs Solutions Inc. ([J](#))

Jacobs specializes in high-end engineering: water systems, clean energy projects, environmental cleanup, smart transportation grids. They’re a top choice for states outsourcing city-scale upgrades — a key piece of sustainability baked into modern infrastructure packages.

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Vulcan Materials Co. ([VMC](#))

America's largest producer of crushed stone, gravel, and sand — the essential ingredients of concrete and asphalt. Roads and airports rely on Vulcan's quarries. More federal spending means more aggregate volume — and pricing power for Vulcan.

6–9: Raw Materials & Domestic Manufacturing

Martin Marietta Materials ([MLM](#))

A direct peer to Vulcan, with added exposure to cement and ready-mix concrete. Their network of quarries near metro hubs gives them an advantage when states rebuild roads, ports, and urban cores.

Nucor Corp. ([NUE](#))

America's best-run steelmaker — lean, modern mini-mills, strong recycling operations, and low debt. If the steel cycle heats up, Nucor is a safer, steadier bet than legacy mills.

Commercial Metals Co. ([CMC](#))

Specializes in steel rebar — the rods inside concrete structures that make bridges and overpasses durable. Rebar demand rises directly with highway and bridge construction. CMC's domestic scrap-to-steel model fits the sustainability push too.

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Eastman Chemical Co. ([EMN](#))

Supplies coatings, advanced resins, polymers, and feedstocks. Reshoring means more U.S. manufacturing — Eastman provides the chemical building blocks for packaging, auto parts, electronics, and building materials.

10–12: Energy Beneficiaries

ExxonMobil ([XOM](#))

Red tape cuts on drilling, new access to federal land, and faster LNG export approvals all help Exxon. A construction boom also boosts diesel demand for machinery — a double benefit for Big Oil's largest player.

Kinder Morgan ([KMI](#))

Owns pipelines, terminals, and storage. Higher production needs more transport capacity. Kinder Morgan profits on volume moved — not oil's price — so steady flows mean steady fees.

12–14: Housing & Materials

Lennar Corp. ([LEN](#))

When new highways, sewer lines, or broadband open up undeveloped land, housing demand usually follows. Lennar, a major homebuilder focused on affordable and suburban homes, stands to gain when development surges outward.

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Weyerhaeuser Co. ([WY](#))

North America's top timberland owner. They grow trees, harvest logs, and operate sawmills. Lumber demand spikes alongside new construction booms. Plus, Weyerhaeuser leases land for carbon credits and renewable energy — adding an ESG angle.

Eagle Materials Inc. ([EXP](#))

A reliable supplier of cement, gypsum wallboard, and concrete — the backbone of schools, roads, housing, and offices. Smaller than giant peers but well-positioned for sharp volume spikes.

15: Border & Defense

Lockheed Martin ([LMT](#))

Border infrastructure often means more than fences — think drones, surveillance systems, and secure checkpoints. Lockheed's defense technology and federal contract base put it in a prime spot for any boost in security spending.

16: Regional Banks

U.S. Bancorp ([USB](#))

Contractors need loans to buy equipment and hire labor. Local governments issue bonds to fund projects. U.S. Bancorp is a large, stable regional bank with deep ties to commercial lending and muni financing.

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₿ 17–18: Crypto Hedge

MicroStrategy ([MSTR](#))

Essentially a leveraged Bitcoin play. CEO Michael Saylor famously used cheap debt to buy massive amounts of BTC. If deficit spending spikes and the Fed stays dovish, Bitcoin could benefit as a hedge — and MicroStrategy rides the wave.

Coinbase ([COIN](#))

If the dollar weakens due to ballooning deficits, Bitcoin and crypto sentiment may surge. More traders = more volume = more fees for Coinbase. They're also expanding into stablecoins and staking, broadening the base.

✓ How to Play This Theme

A few practical reminders:

- **Diversify.** If picking individual winners feels too risky, sector ETFs targeting infrastructure, materials, or industrials (like PAVE, XLI, XLB) provide broad exposure.
- **Watch Washington.** Big bills change as they move — spending could shrink, shift, or come in phases. Stay tuned to budget fights and project rollouts.
- **Hedge smartly.** Some investors use Bitcoin or gold as partial hedges if massive spending stirs up fresh inflation risks.

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Wrapping Up

President Trump’s “Big Beautiful Bill” isn’t just politics — it’s trillions of dollars flowing into physical assets, reshoring factories, revitalizing energy production, and securing America’s borders.

For investors willing to do their homework, this historic spending plan could create once-in-a-generation opportunities across multiple sectors.

Use this guide as your launchpad — dig deeper, study these companies, and track how the spending unfolds in the months ahead.

Stay smart, stay prepared, and stay ahead.

— Global Market News

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