



Nuclear

Stocks: BWXT LEU SMR OKLO NNE CCJ

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Acronyms

FPE: Forward Price Earnings.

RSI: Relative Strength Index, a measure of price momentum. Typically, >70 can be seen as overbought, 50 is neutral, whilst <30 is oversold.

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BWX Technologies (BWXT)



Daily cyclical setup: cyclically extremely high

RSI: 81s

Natural price magnets: downside gap to the \$154s

Market cap: 16bn

FPE: 44s

Y: 0.4%

Miscell' comments: top tier nuclear company, but its way overbought, after a run from the April \$84s to the \$189s

BWX Technologies (BWXT)



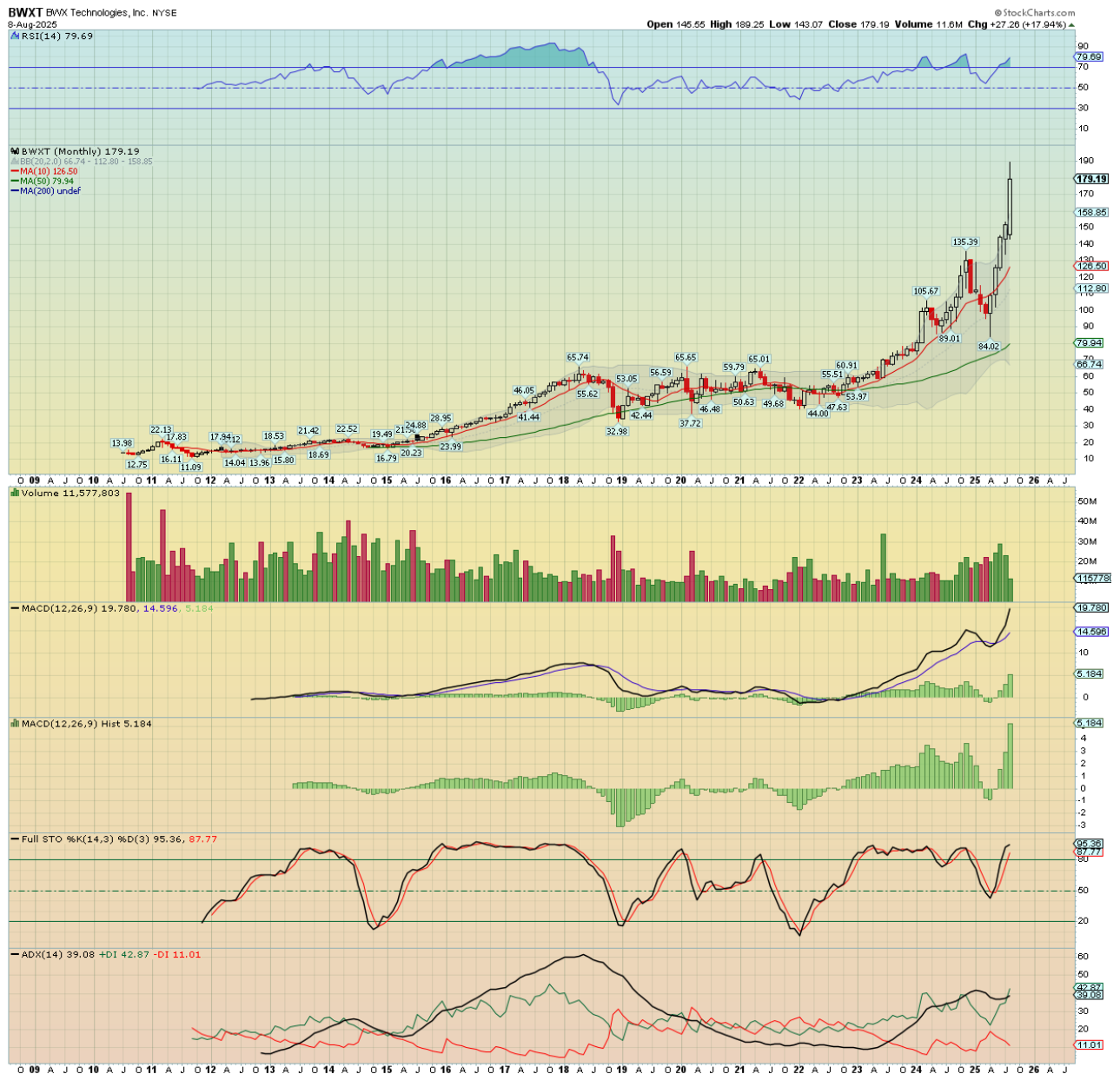
Weekly cyclical setup: cyclically very high

RSI: 81

Natural price magnets: \$179s are \$9 above the upper weekly bollinger. Basic cooling... 145, secondary 135

Miscell' comments: weekly vol' was a high 10.2M... but not a record.

BWX Technologies (BWXT)



Monthly cyclical setup: overbought, if m/t bullish unless <10MA \$126s.

RSI: 79s

Natural price magnets: basic cooling \$135s

Miscell' comments: the stock has effectively doubled up from the April \$84s

Centrus Energy (LEU)



Daily cyclical setup: cyclically low

RSI: 55s

Natural price magnets: 50dma... \$189s, 150s, 120s

Market cap: 4bn

FPE: 62s

Y: -

Miscell' comments: powerful run from the April \$49s > \$264s... a clear 400%

Centrus Energy (LEU)



Weekly cyclical setup: cyclically high, although momentum is weakening

RSI: 68s

Natural price magnets: weekly 10MA... around psy' \$200.

Miscell' comments: a multi-week retrace of the April>August wave is due

Centrus Energy (LEU)



Monthly cyclical setup: momo is on the very high side.

RSI: 78s... overbought

Natural price magnets: ... monthly 10MA... \$121s

Miscell' comments: five months up... due some cooling

NuScale Power (SMR)



Daily cyclical setup: cyclically low.

RSI: 41s

Natural price magnets: 200dma... \$25s

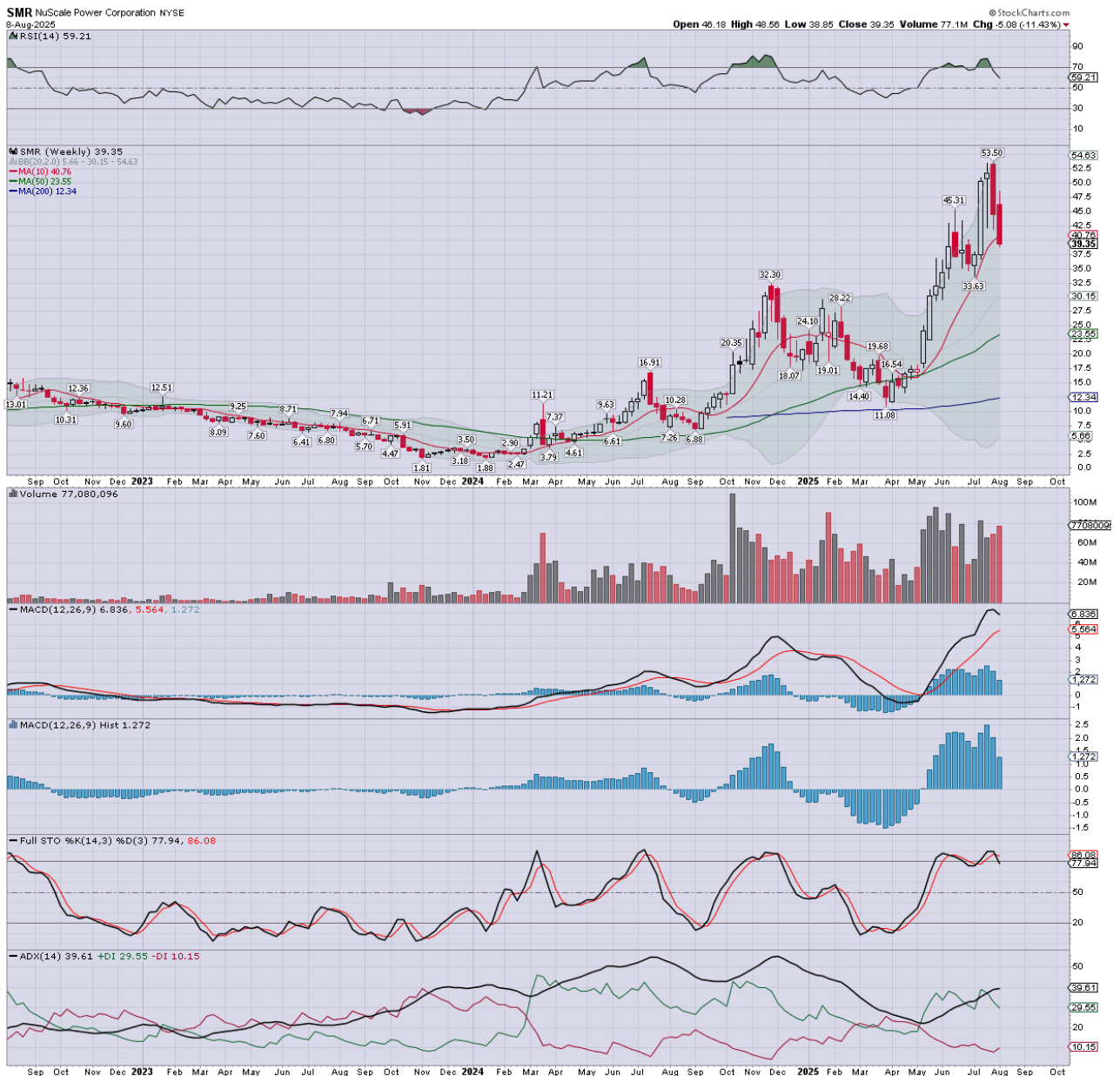
Market cap: 11bn

FPE: -

Y: -

Miscell' comments: a monstrous run from the April \$11s to August \$53s

NuScale Power (SMR)



Weekly cyclical setup: weekly momentum due to turn negative in 2-3 weeks

RSI: 59s

Natural price magnets: 25s

Miscell' comments: note the recent bearish engulfing candle... likely marking a key m/t top.

NuScale Power (SMR)



Monthly cyclical setup: momo has started to weaken

RSI: 64s

Natural price magnets: monthly 10MA.. \$28s

Miscell' comments: a truly monstrous run from the Jan'2024 low of \$1.88 to the \$53s.

Oklo (OKLO)



Daily cyclical setup: daily momo due to turn negative August 11th

RSI: 56s

Natural price magnets: 55s, and orange/red gaps

Market cap: 11bn

FPE: -

Y: -

Miscell' comments: vulnerable with the main market in Sept/Oct

Oklo (OKLO)



Weekly cyclical setup: very high

RSI: 71s, overbought

Natural price magnets: 10MA \$62s.

Miscell' comments: the weekly candle is very spiky on the upper side, indicative of tired bulls.

Oklo (OKLO)



Monthly cyclical setup: very high, prone to cooling

RSI: 78s, overbought

Natural price magnets: monthly 10MA \$42s

Miscell' comments: a monstrous run from the \$5s to the \$85s

Nano Nuclear Energy (NNE)



Daily cyclical setup: cyclically... marginally low.

RSI: 49s

Natural price magnets: 20/19

Market cap: 1.5bn

FPE: -

Y: -

Miscell' comments: far more choppy relative to the sector

Nano Nuclear Energy (NNE)



Weekly cyclical setup: momentum prone to tuning negative as of August 22nd

RSI: 55s

Natural price magnets: 25s

Miscell' comments:

Nano Nuclear Energy (NNE)



Monthly cyclical setup: stock is too new for most momentum indicators.

RSI: -

Natural price magnets: monthly 10MA... \$30s

Miscell' comments: the recent four monthly candles are all spiky on the upper side... indicative of tired bulls.

Cameco (CCJ)



Daily cyclical setup: cyclically low

RSI: 56

Natural price magnets: 71/70 zone... with the 50dma

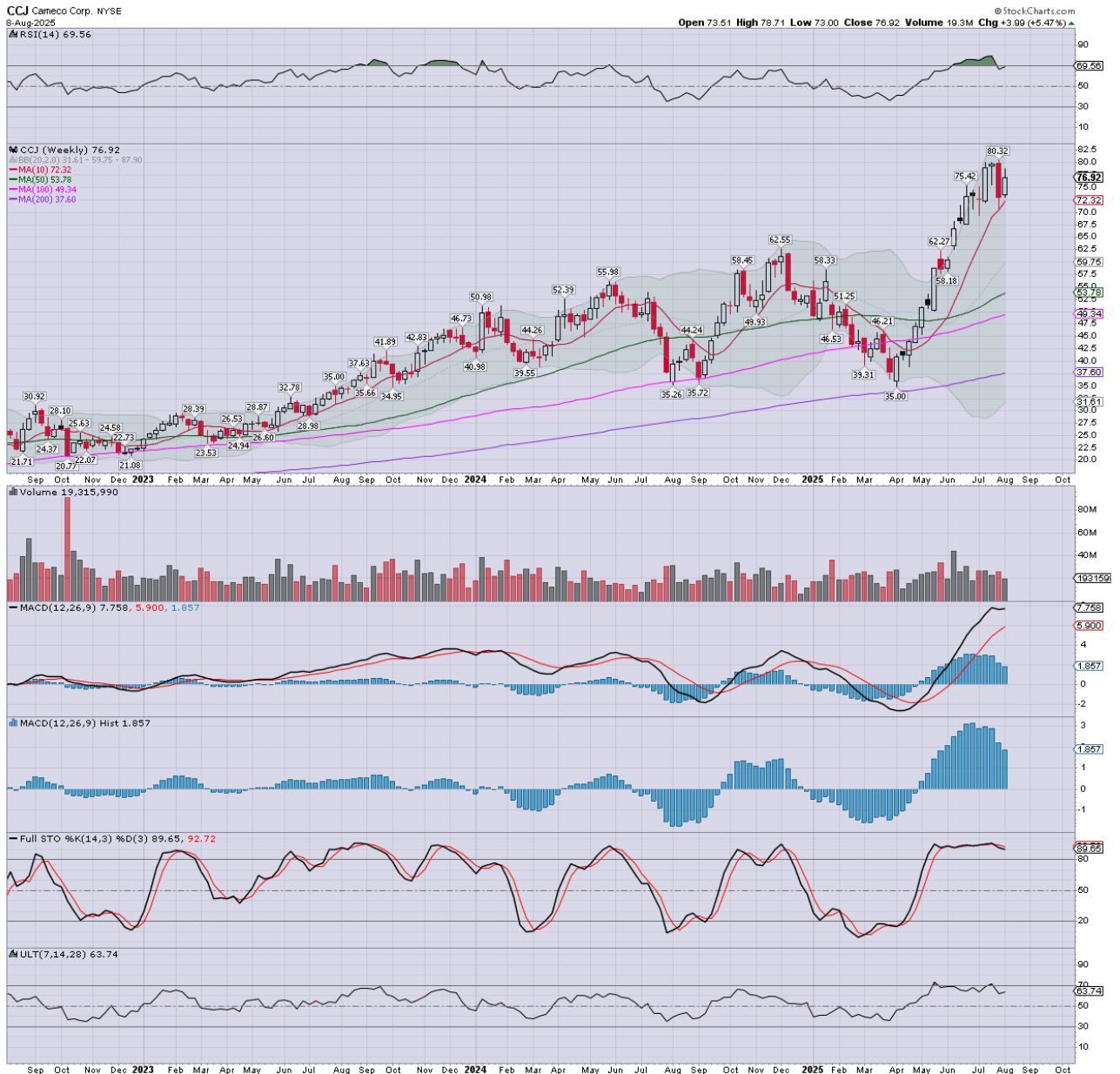
Market cap: 34bn

FPE: 48

Y: 0.2%

Miscell' comments: considerable resistance in the \$80s. A break <50dma will merit alarm bells, with prime target of key price threshold.... \$56s

Cameco (CCJ)



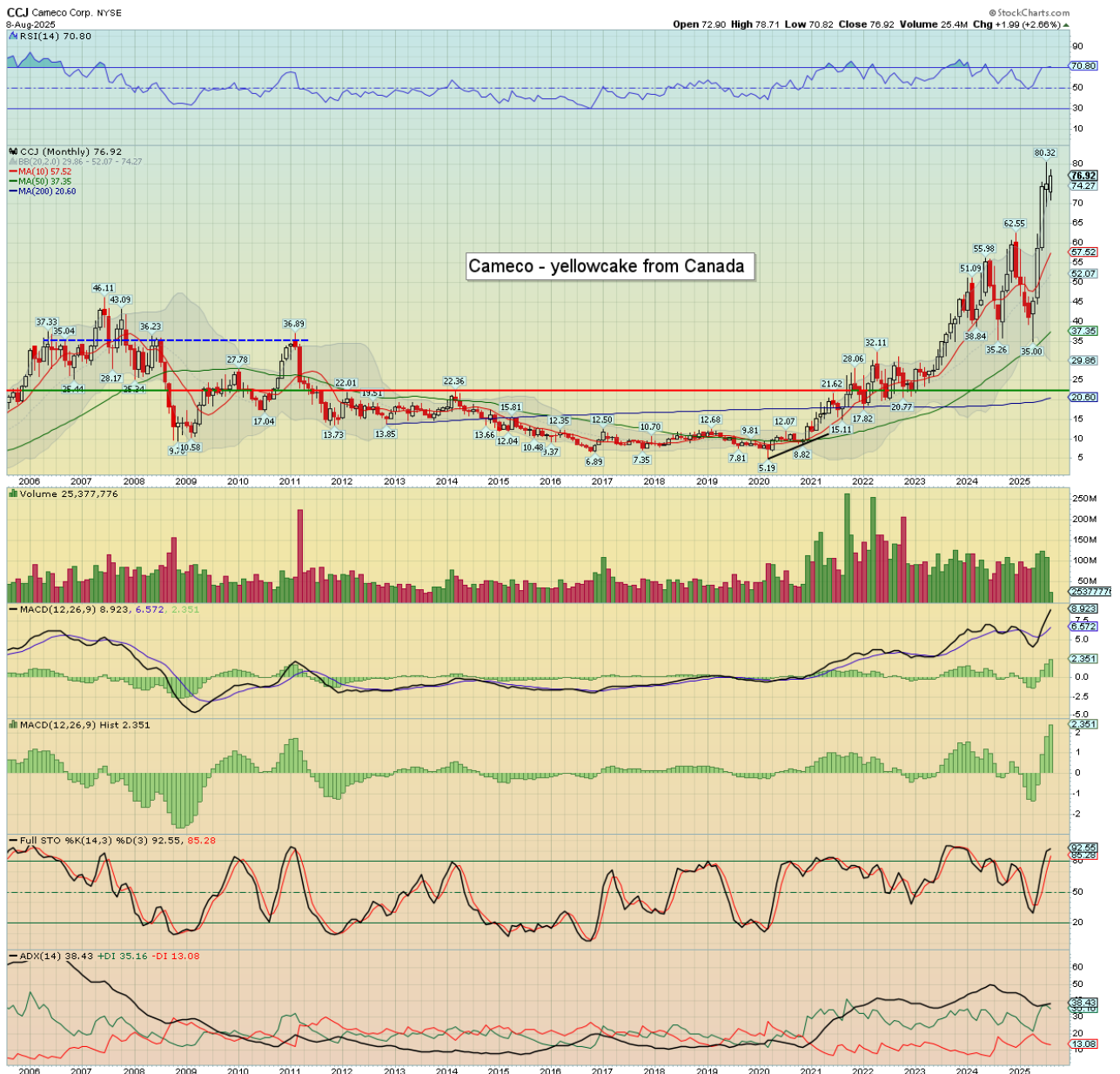
Weekly cyclical setup: cyclically high, momo is weakening, prone to turning negative in mid September.

RSI: 69s

Natural price magnets: soft target... Dec'2024 \$62s

Miscell' comments: powerful run from the April 35s > 80s.

Cameco (CCJ)



Monthly cyclical setup: on the high side.

RSI: 70s... overbought

Natural price magnets: monthly 10MA \$57s

Miscell' comments: monstrous run from the March 2020 \$5s to the July \$80s, as there was a realisation (within most nations) that nuclear is essential to the global economy.

Summary

OKLO (where the hot money tends to go) is the sector leader.
... whilst BXMT is the best and established of the nuclear stocks.

Clearly, Cameco is only the miner of the six.

Personally, I have only ever traded SMR, and CCJ.

My primary issue remains the main market, which (in theory) should cool back, at least to the SPX 5800s within Sept/Oct, before resuming upward into early 2026. If correct, the nuclear stocks could be expected to be dragged down to some degree.

Final note... if you can't stomach daily swings of 5-10%, the nuclear stocks are not for you!

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