



Generative Artificial Intelligence
**The Most Important
Innovation since Electricity?**

Dom Rizzo
Portfolio Manager

Julian Cook *(Moderator)*
Portfolio Specialist

September 2023

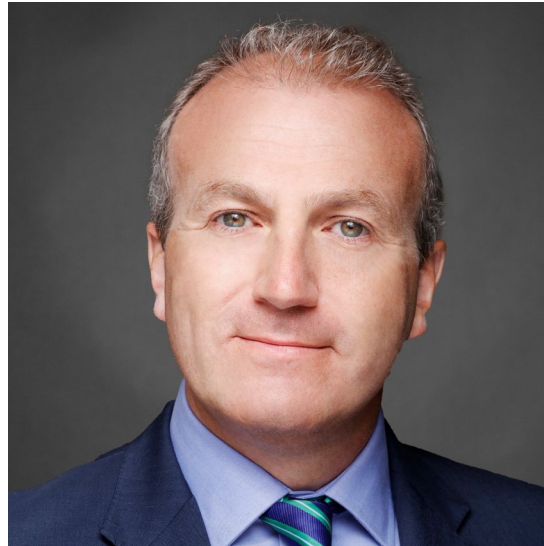
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Today's Speakers



Dom Rizzo, CFA
Portfolio Manager
Global Technology Equity Strategy

Moderator



Julian Cook, CFA
Portfolio Specialist



Investment framework

Provide mission-critical, linchpin technologies



Improving fundamentals



Innovating in secular growth markets



Reasonable valuations



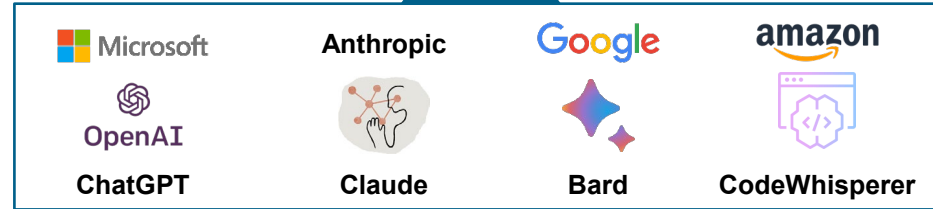
Given our Global platform and research depth, we are uniquely positioned to identify early those special companies that sell linchpin technologies.

Dominic Rizzo, Portfolio Manager

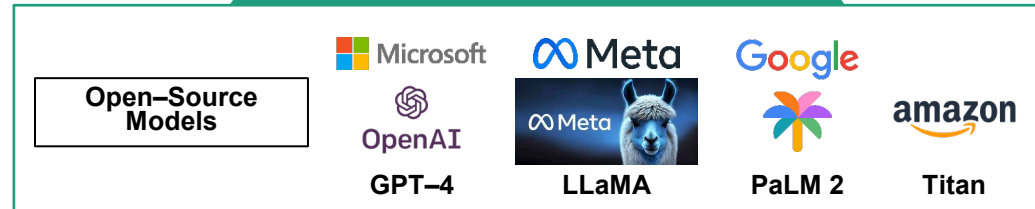
The Hierarchy of AI

As of 1 September 2023

Applications/Other



Foundational Models



Infrastructure & Enablers



Chip Ecosystem



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Q&A



Thank You