

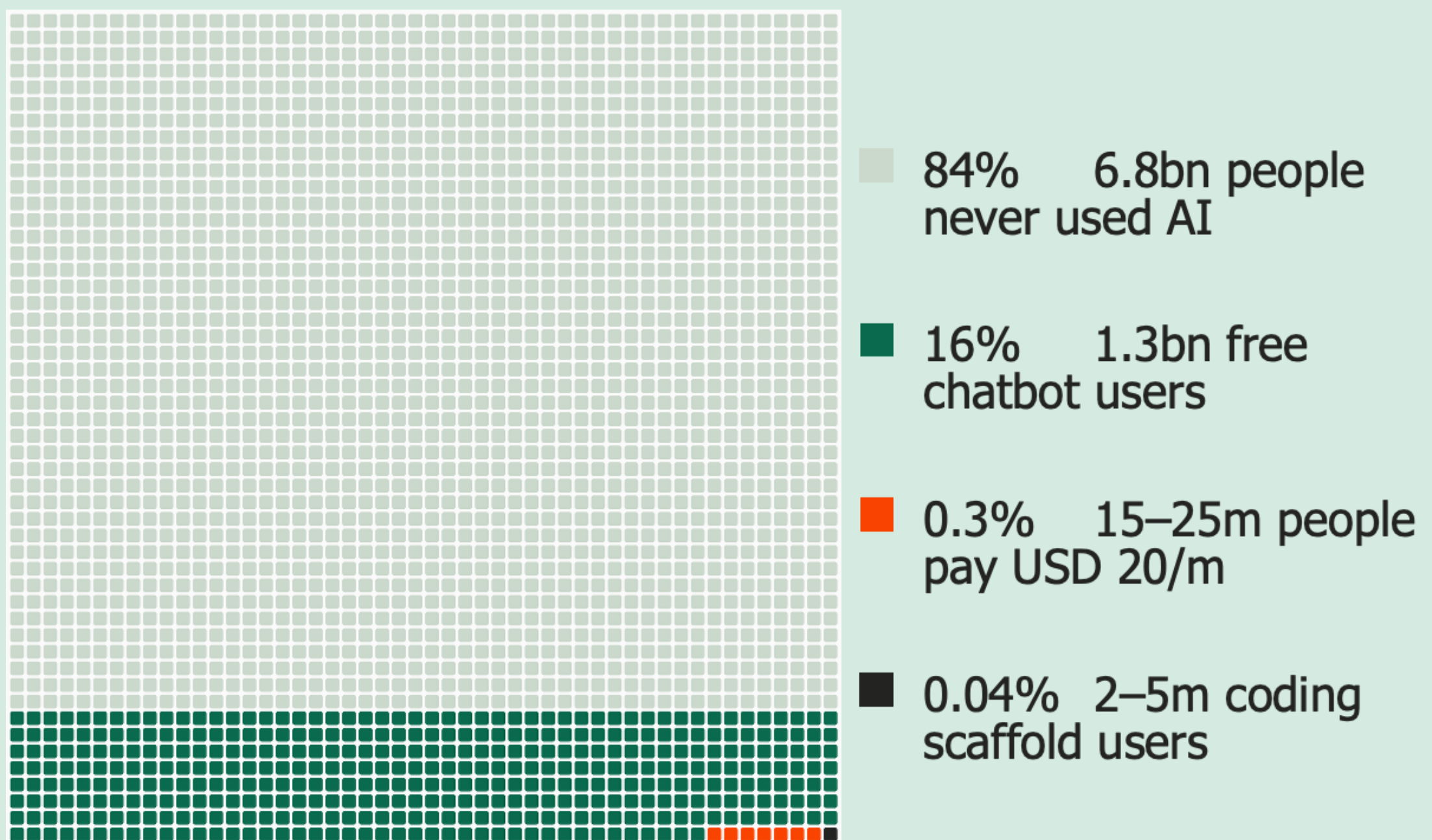
ASSET MANAGEMENT SERIES

THE AI REVOLUTION IS JUST BEGINNING



Untapped **potential**

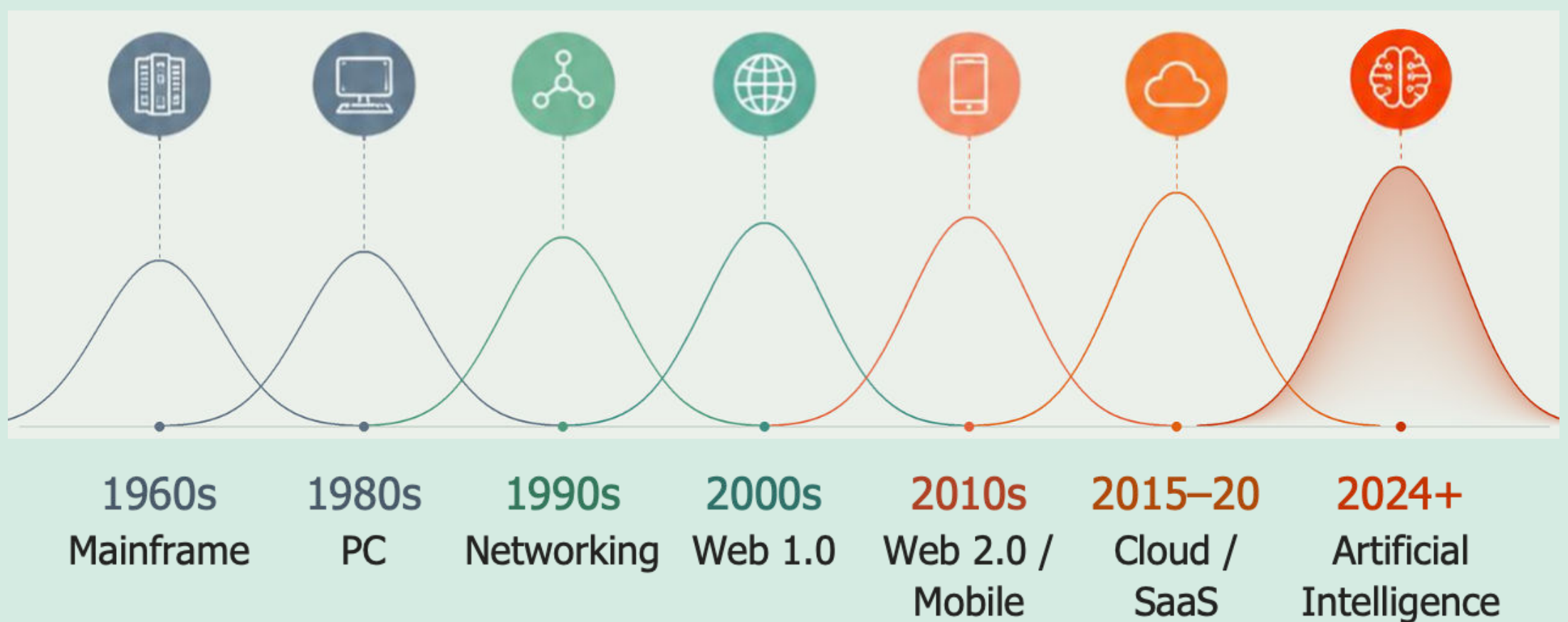
The gap between awareness and advanced usage is still **enormous**



INNOVATION CYCLES

Innovation waves unfold over **many years**

Each cycle creates a new set of leaders



HOW LONG MAJOR WAVES LAST

Electrification
+40 YRS

Smart phones
20 YRS

PC
30 YRS

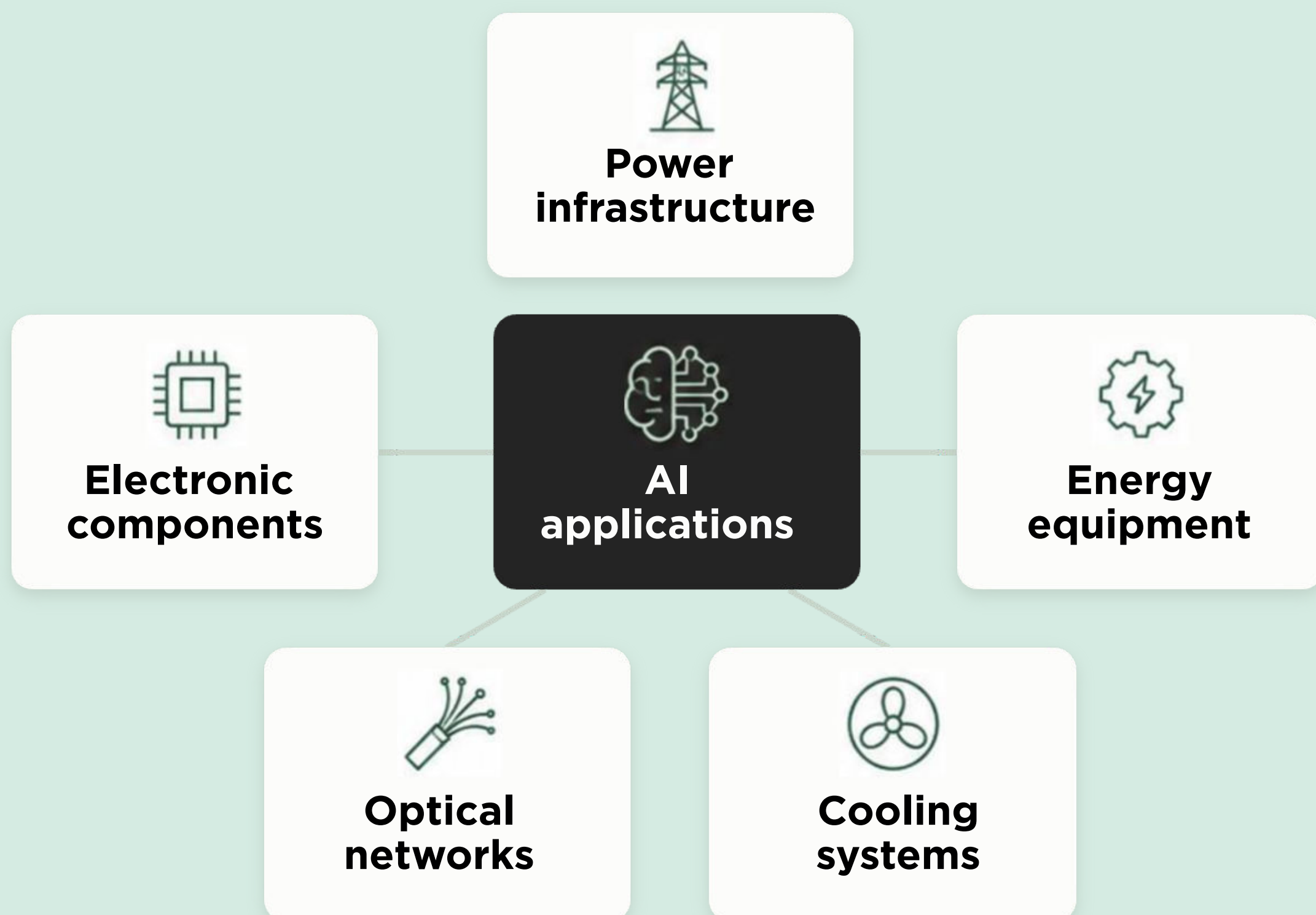
Cloud
15 YRS

Internet
25 YRS

AI
JUST STARTED

The hidden AI beneficiaries

For every AI application, numerous companies enable the infrastructure



LOOKING BEYOND THE OBVIOUS

The next investment opportunities may come from the enablers

...not only from those **developing AI**

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