Navigating the new investment landscape

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Regime Changes

Important to adapt regardless of investment style

- Transition into a new investment regime characterised by
  - Potential for rates to remain higher and a more volatile business cycle
  - De-globalisation with a challenging geopolitical backdrop
  - Unprecedented levels of disruption

→ Makes economic forecasting much harder

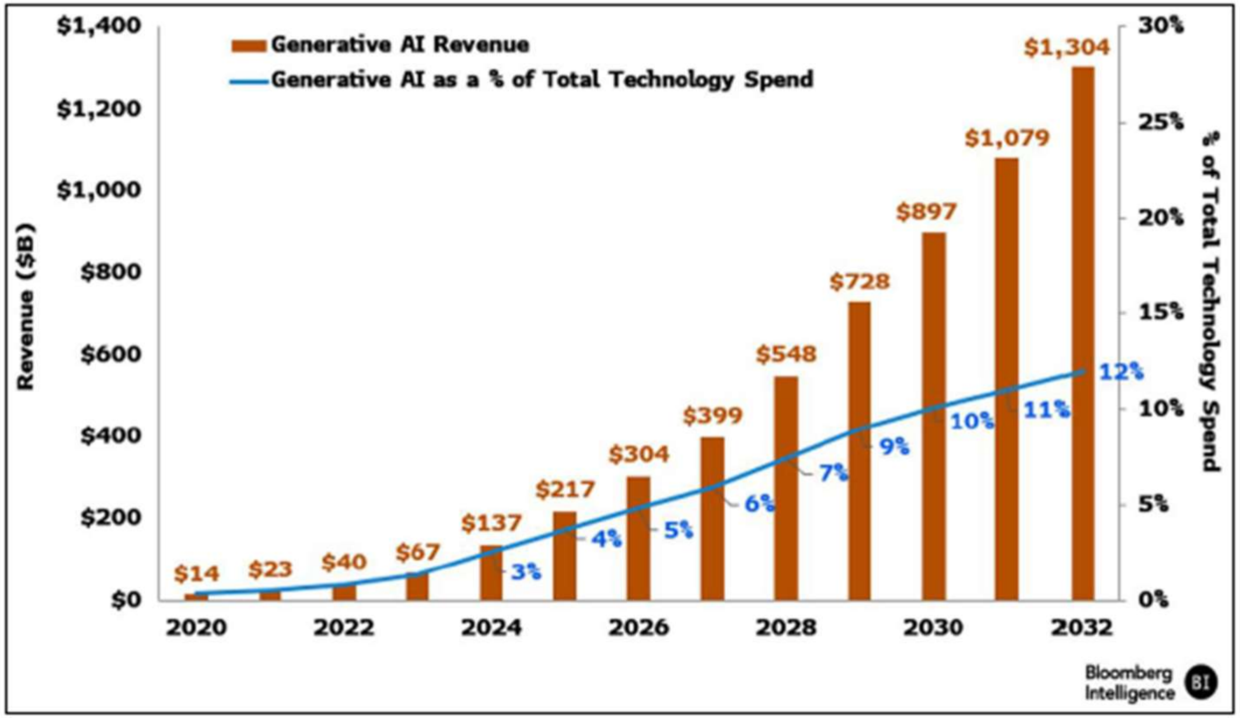
- Positive for active stock pickers

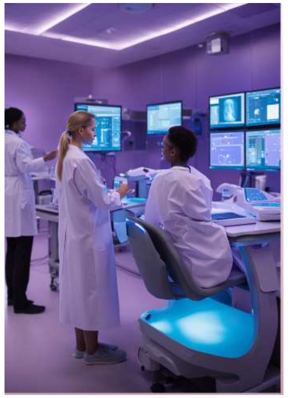
- Dynamic portfolio management will be critical

Disruption – Generative AI

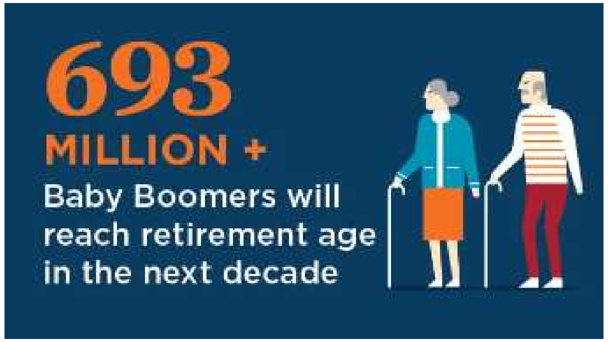
Impacts all industries

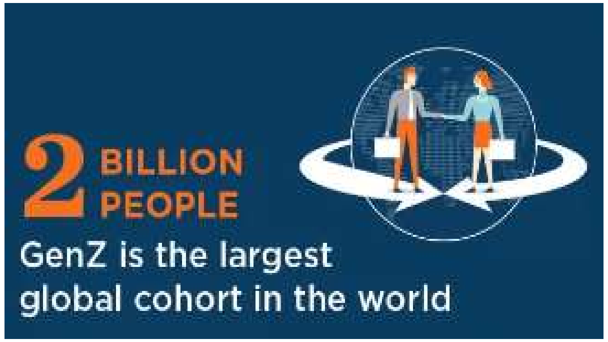
Generative AI is poised to be a $1.3 trillion market by 2032





Disruption – Seismic Demographic Changes by 2030





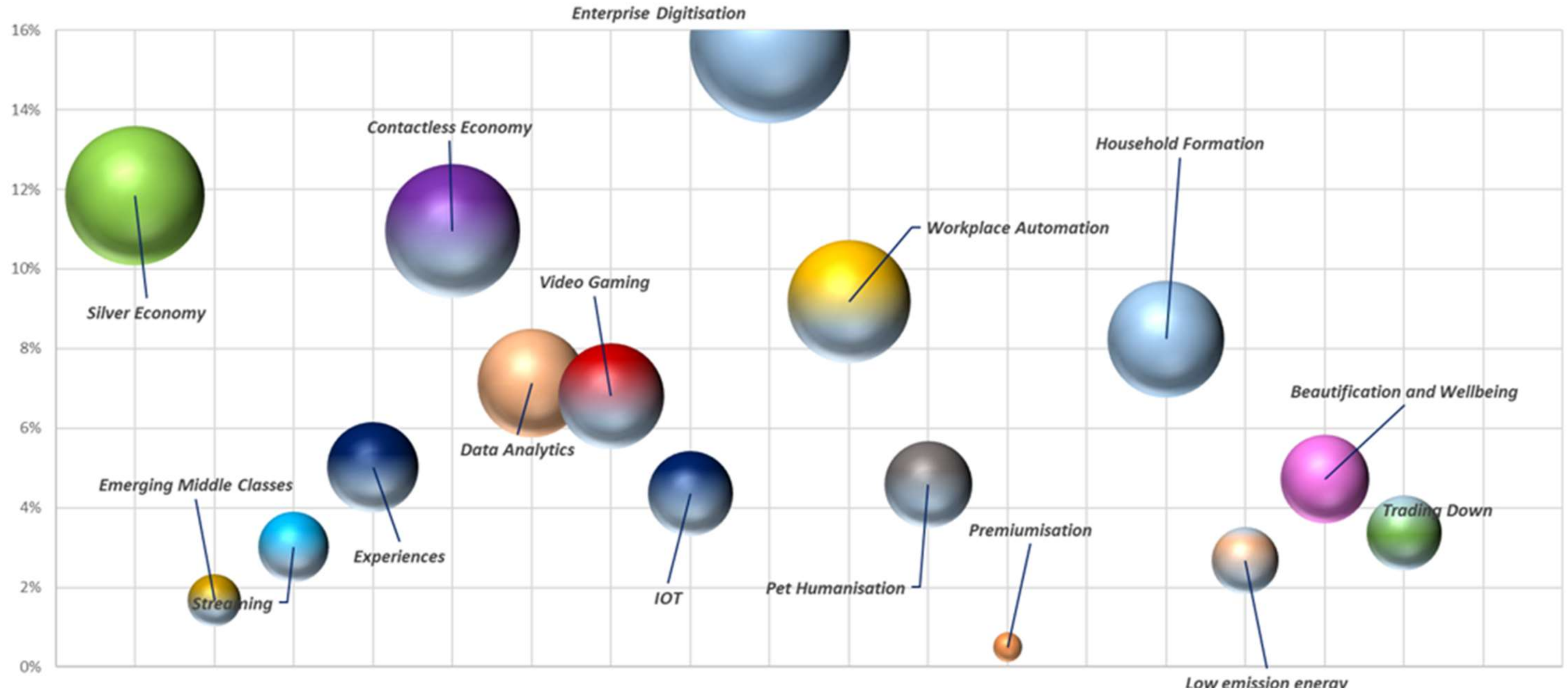
Megatrends well positioned
to navigate the new investment landscape

- Significant benefits to client's portfolios include:
  - ✓Less sensitive to the cycle and helps improve diversification
  - ✓Strategically aligning with leaders for future index prominence
  - ✓Avoiding investment oversights as less style driven

- A systematic data-driven approach vital for consistently capturing opportunities from:
  - ✓The tailwind of the megatrend itself
  - ✓The Alpha generated by the company that is at the pinnacle of innovation

Insync Megatrends

Diversified group of megatrends



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