

Quality investing – we focus on the best businesses in Asia

A highly selective approach

Source: abrdn, 30 September 2022

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What do we mean by Quality?



Every company graded on 5 factors

Key investment themes

Where we are finding the best opportunities

Aspiration



Rising affluence in Asia is leading to fast growth in premium consumption in areas including personal care products, financial services and food and beverage

Building Asia



Urbanization and an infrastructure boom is set to benefit property developers and materials producers such as cement

Digital future



Growing integration amid the widespread adoption of technology means a bright future for plays on gaming, internet, fintech and tech services like the cloud

Going green



Policy makers globally are committing to a greener and lower carbon future and Asia is in the driver's seat. Plays on renewable energy, batteries, electric vehicles, related infrastructure, and environmental management all have a bright future. Grid parity will be game-changing

Health and wellness



Asia is home to a diverse range of companies leading advancements in biotech and medical device technology. Our holdings include plays on contract research, respiratory and sleep care, vaccinations, pharmaceuticals and diagnostic products

Tech enablers



Asia tech supply chains are well positioned for structural growth related to the rollout of 5G, big data and digital interconnectivity

Source: abrdn, 30 September 2022. Investment themes are subject to change

In conclusion



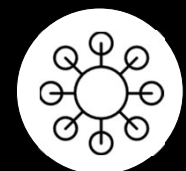
People,
Quality and
Active investors



ESG
integration
– we effect
positive change
through
engagement



Credible
track
record



Challenging
times present
opportunities,
our process
allows us to
capture this