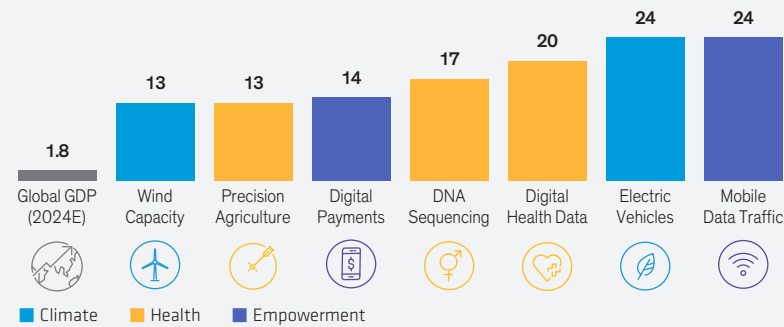


## Built around forward-looking secular investment themes, not backward-looking benchmarks.

Compelling investment themes have their own drivers of growth that span across traditional sectors and industries.

### REPRESENTATIVE SECULAR TAILWINDS

Compounded Annual Growth Rates (Percent)



As of 30 September 2023 | Source: BCC Research, BloombergNEF, Ericsson, Flex, Global Wind Energy Council, Morgan Stanley, SkyQuest Technology Consulting, Statista, Strategic Market Research and AB

## The United Nations Sustainable Development Goals (SDGs) provide a map for thematic investors.

The SDGs represent a powerful consensus of 193 countries committed to solving a set of global challenges that will require an estimated US\$90 trillion\* investment from both the public and private sectors.



\* United Nations and AB as of 30 September 2023 | Image source: UN and AB

## Powerful themes are expected to persist, irrespective of changing geopolitical or economic factors.

Principal themes, derived from the SDGs, provide a solid foundation for dynamic and definable sub-themes.

### THREE PRIMARY THEMES

Supported by Dynamic, Narrow and Definable Sub-Themes



#### CLIMATE Sub-Themes

- Cleaner Energy
- Resource Efficiency
- Sanitation & Recycling
- Sustainable Transportation



#### HEALTH Sub-Themes

- Access to Quality Care
- Food Security & Clean Water
- Medical Innovation
- Well-Being



#### EMPOWERMENT Sub-Themes

- Educational & Employment Services
- Financial Security & Inclusion
- Information & Communication Technologies
- Sustainable Infrastructure

Source: AB

## Grassroots research allows us to uncover opportunities that are often missed in the broader market.

For over 10 years we have been travelling to various local markets to engage individuals, business owners, and government officials on a broad range of topics.

2012 India	2013 Ghana Nigeria South Africa Thailand Philippines Indonesia	2014 Brazil Chile Peru Colombia Mexico China	2015 Vietnam China South Korea India	2016 Japan Indonesia Philippines	2017 China India	2018 China South Africa
2019 Tennessee	2020 Circular Economy (Virtual)	2021 Synthetic Biology (Virtual)	2022 Biodiversity Montana Illinois Iowa Missouri	2023 Near-shoring Monterrey (Mexico)		

As of 30 September 2023

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