

Technology – How to investment in tomorrow



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Disclaimer

The information you hear today does not constitute investment advice nor an offer to invest in any of the companies presenting.

The value of investments and any income from them may go down as well as up.

You may not get back all of your original investment.

Past performance is not necessarily a guide to future performance.

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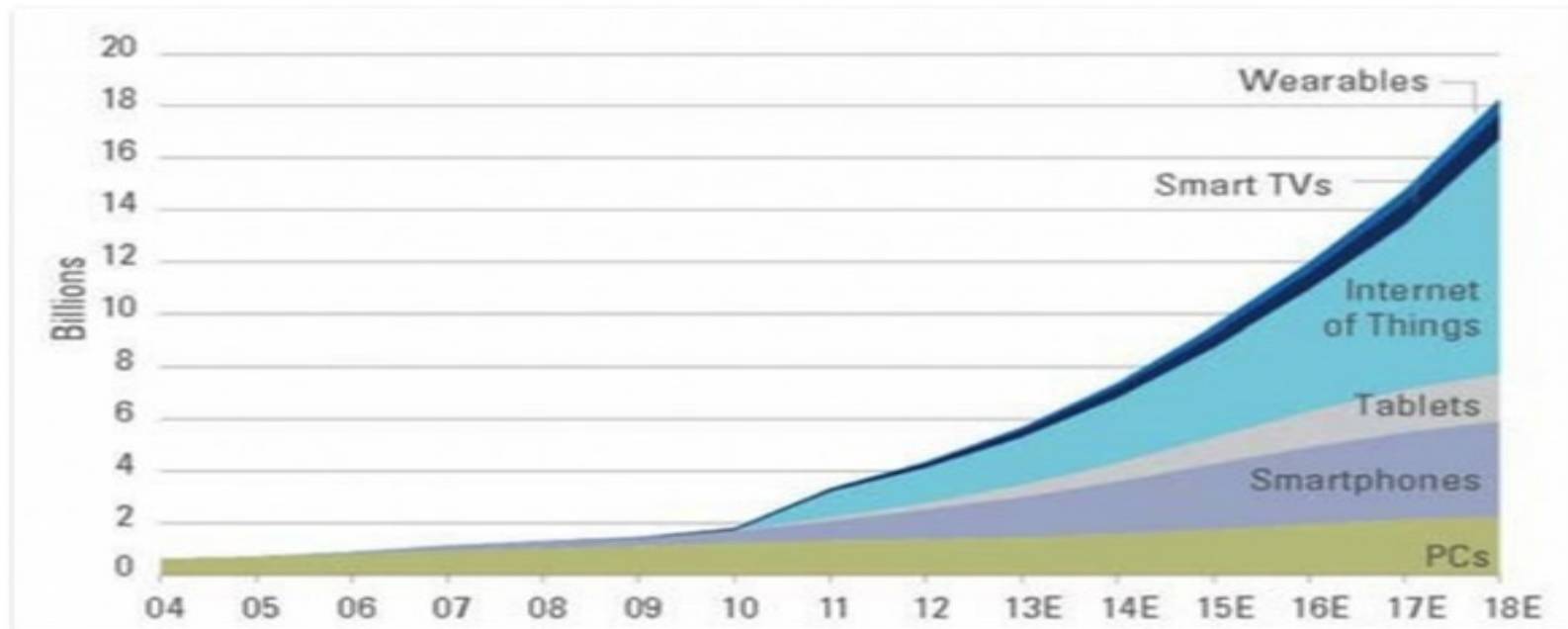
Big Technology Themes

- Mobile
- Big Data & Analytics
- Internet of Things
- 3D Printing
- IT Security

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Technology for consumers

Trends in the Technology Sector



Market Realist

Source: Electroiq, BII estimates

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Need for Innovation



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Notorious: Winners vs Losers

B

ES

MORE STABLE IMAGE

ES

BETTER QUALITY MACHINE

ES

BETTER SOUND QUALITY

ES

LOWER VIDEO NOISE

VHS

XS

CHEAPER

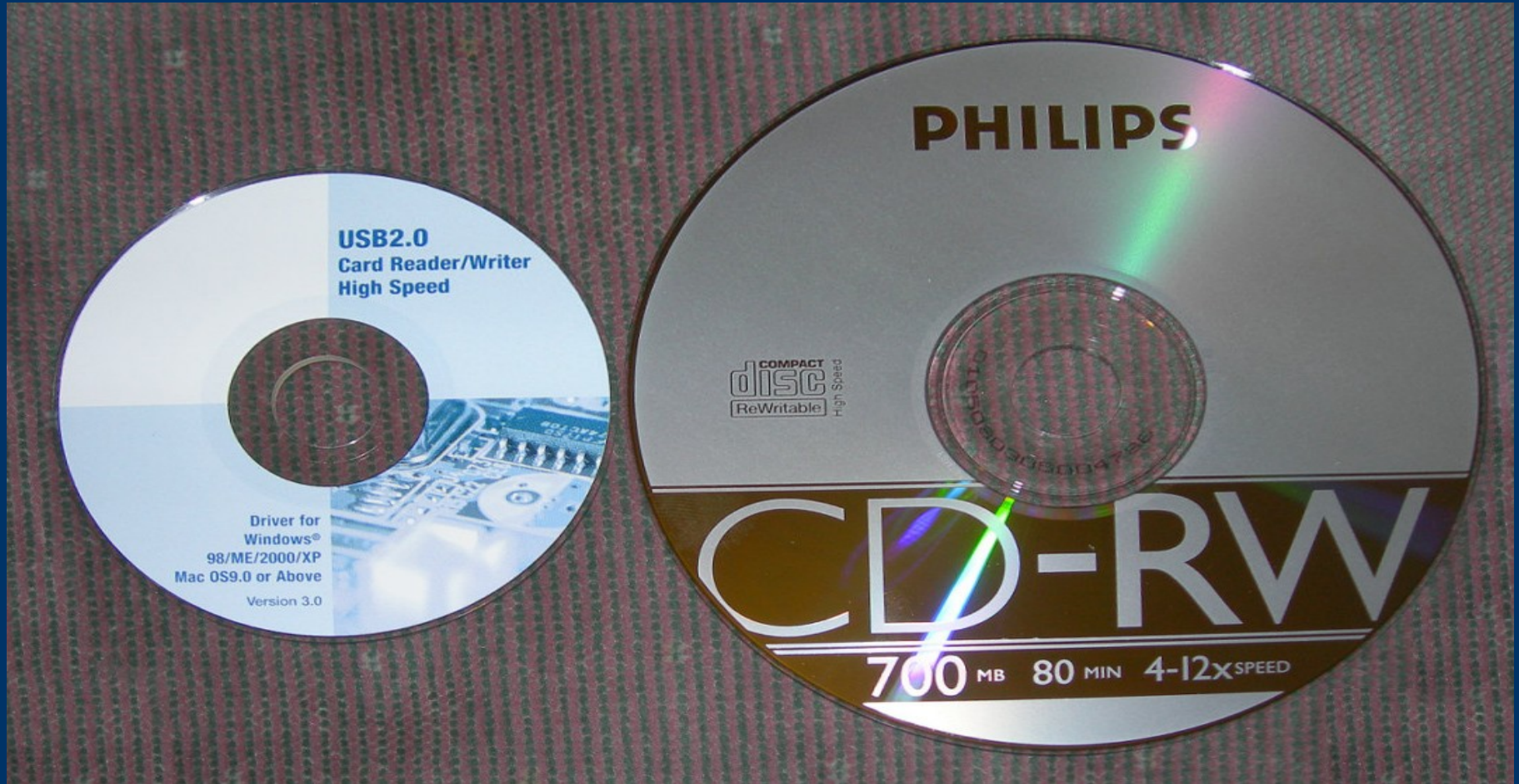
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MORE MOVIES

DO NOT ERASE!

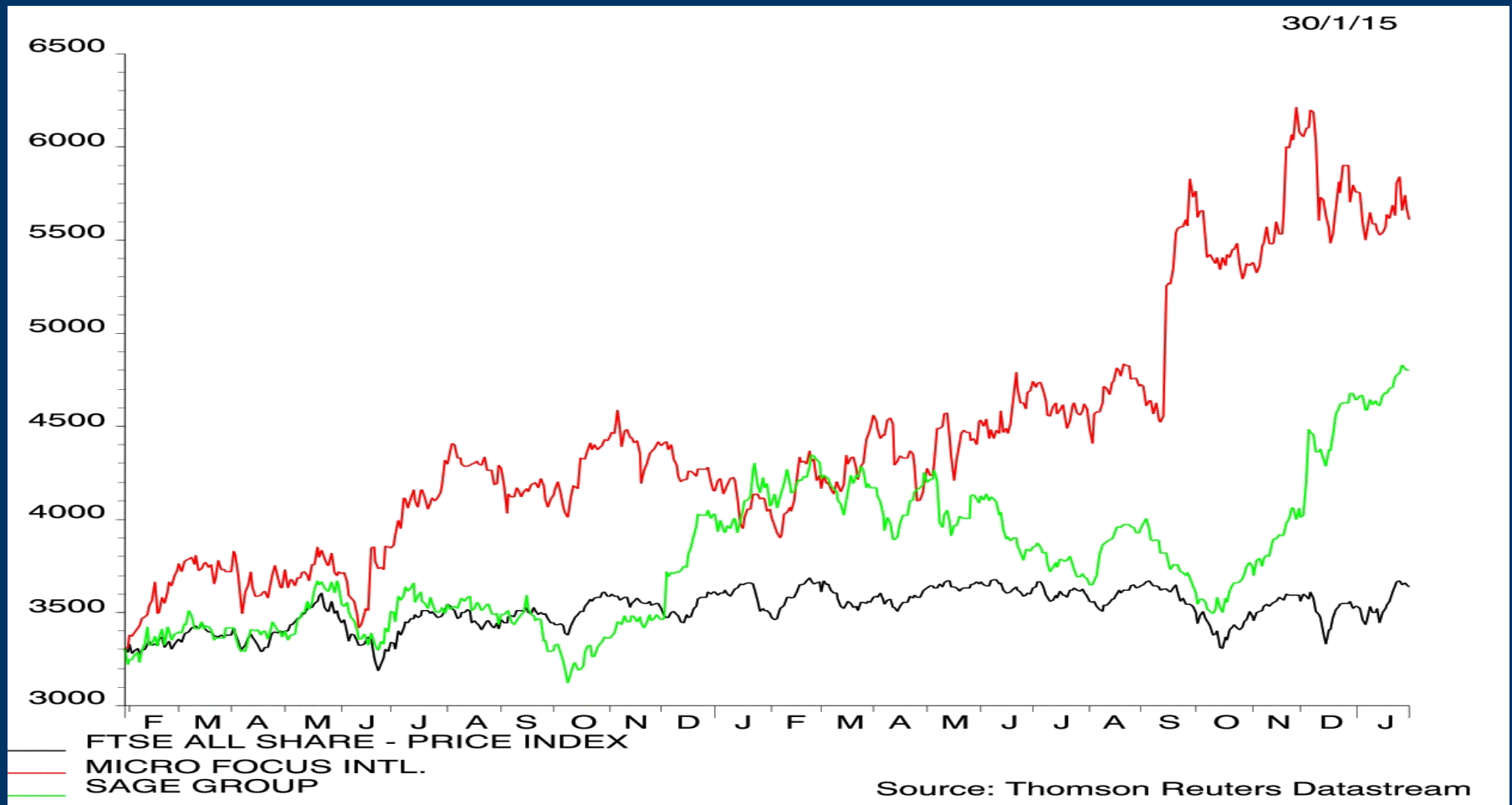
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Notorious: Winners vs Losers



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Return of the utility tech



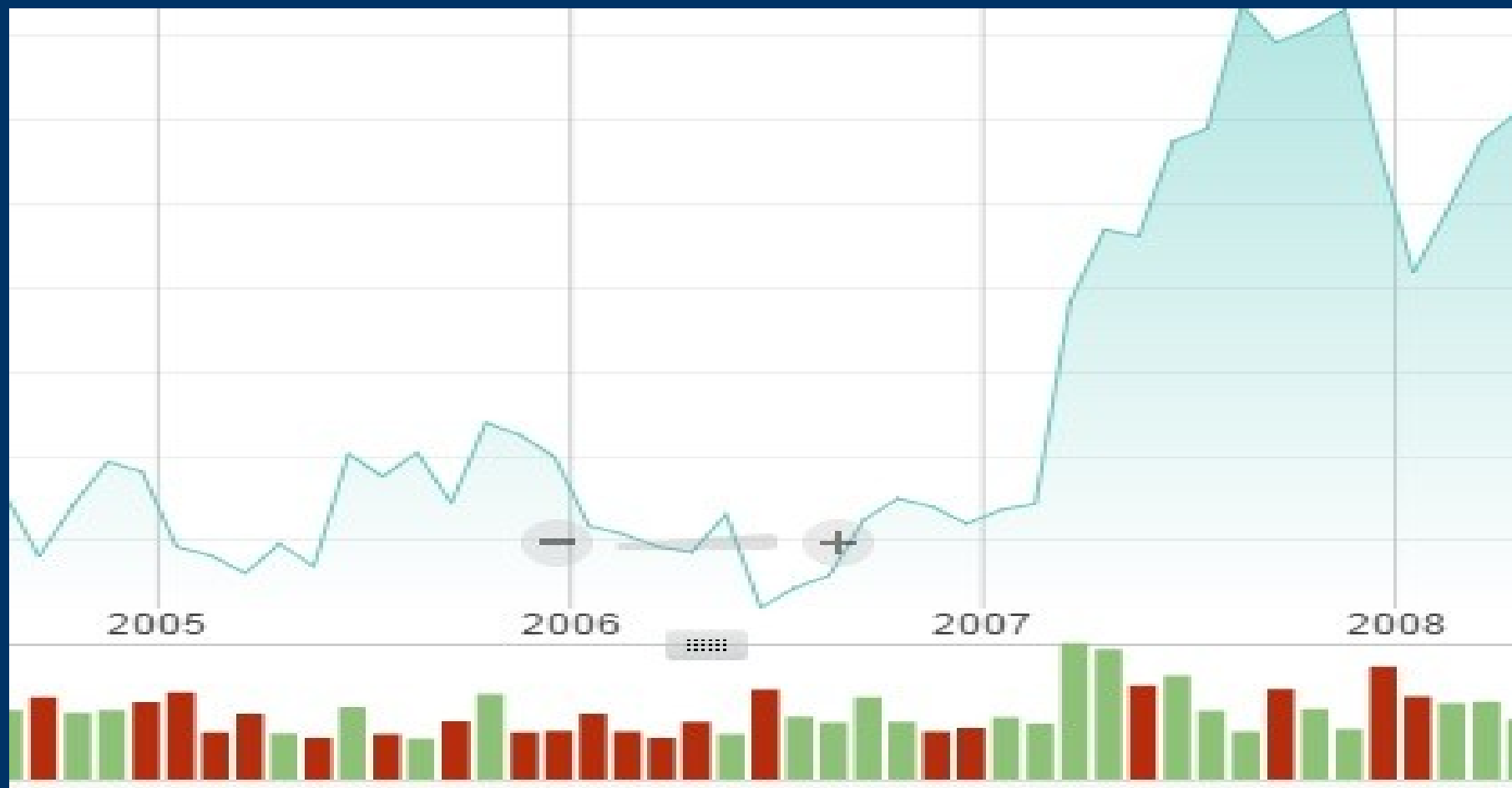
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Investor perceptions: Chart 1



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Investor perceptions: Chart 2



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The big reveal:

amazon.com[®]

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Amazon's startling long-run success



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Amazon: Amazing success

- 1997, IPO at \$18
- \$1,000 invested
- Today worth \$246,000*

**Based on \$345 share price (30 Jan '15)*

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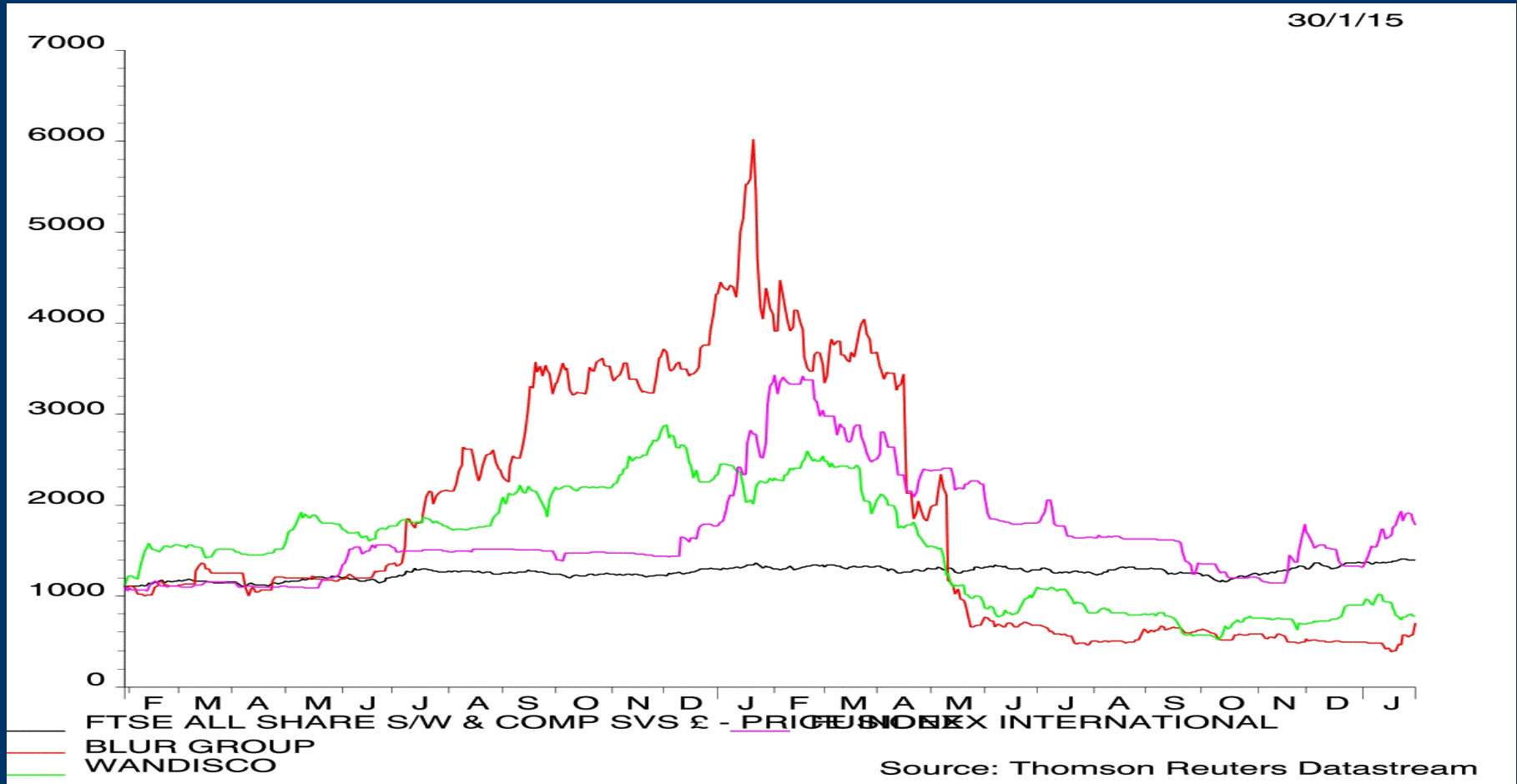


Classic disruption story



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Trial & error: Superstars turned super flops?



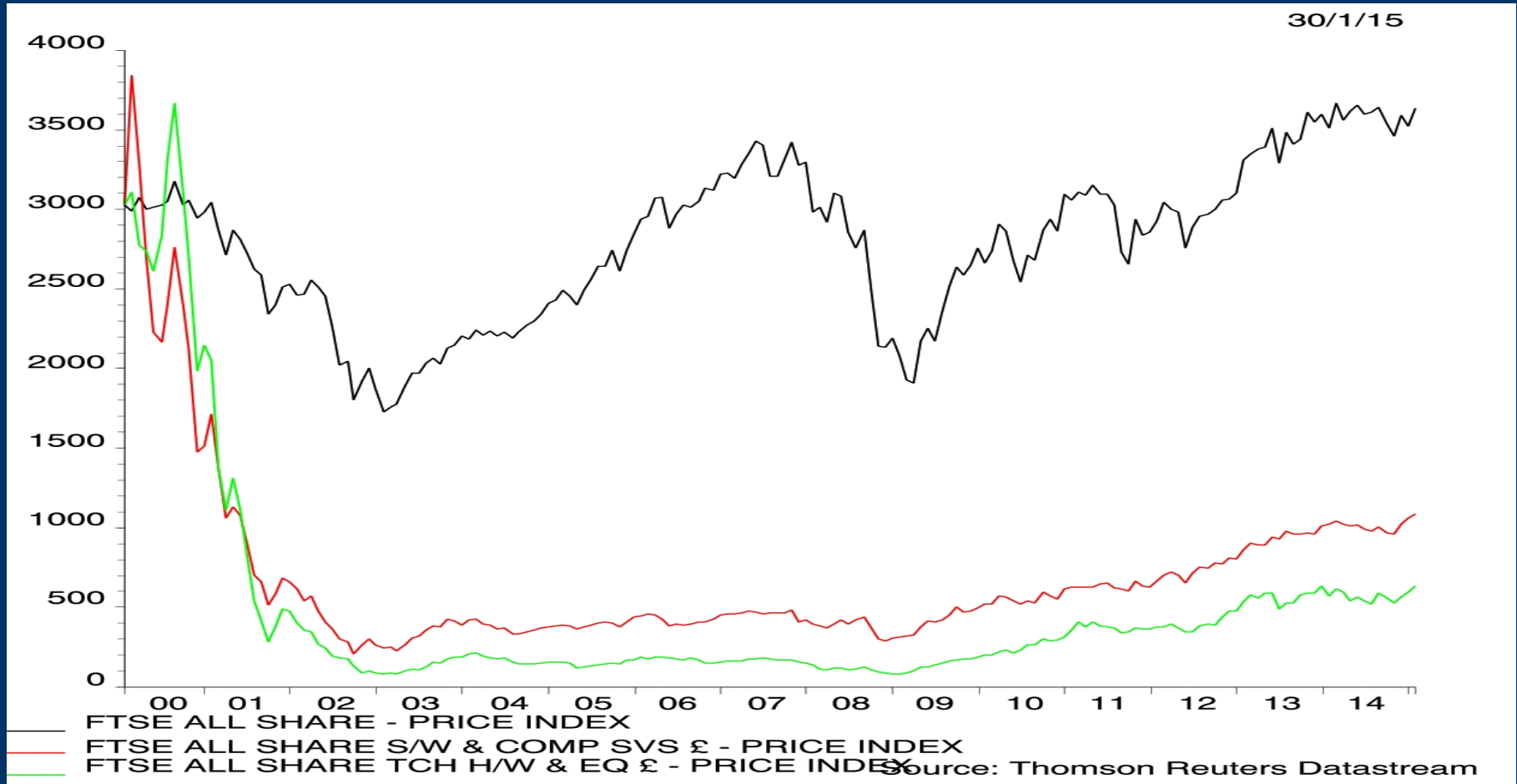
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Technology Hotspots: Payments?



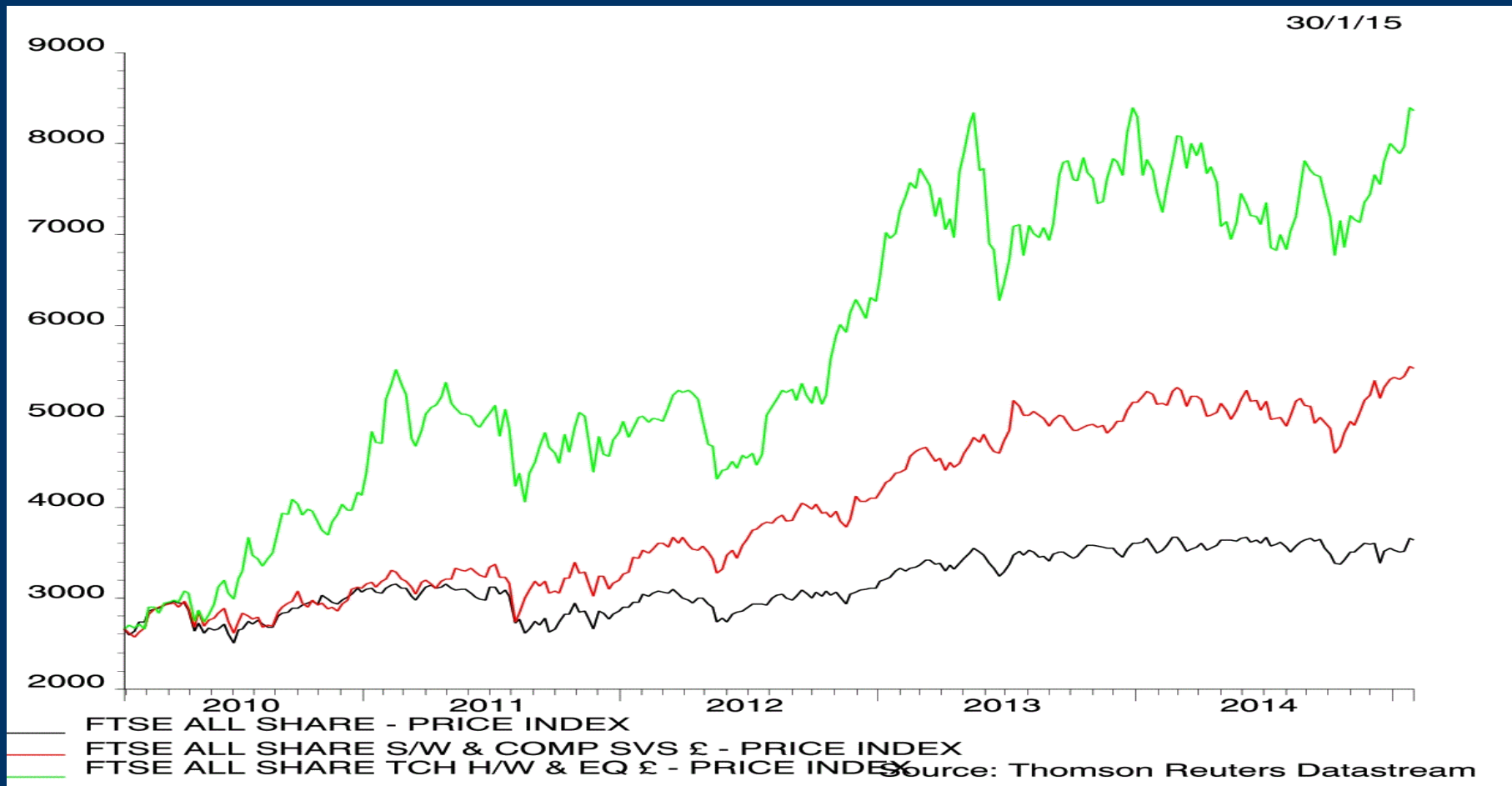
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Technology: Ups & downs



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Technology: Since the crash



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Bottom line: Cash still king



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