



# An introduction to Macrovue Invest Tech 2017

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## About Macrovue



Macrovue is an online investment service which enables Australians to invest in the best companies and global trends shaping the world of tomorrow via thematic portfolios called "Vues".



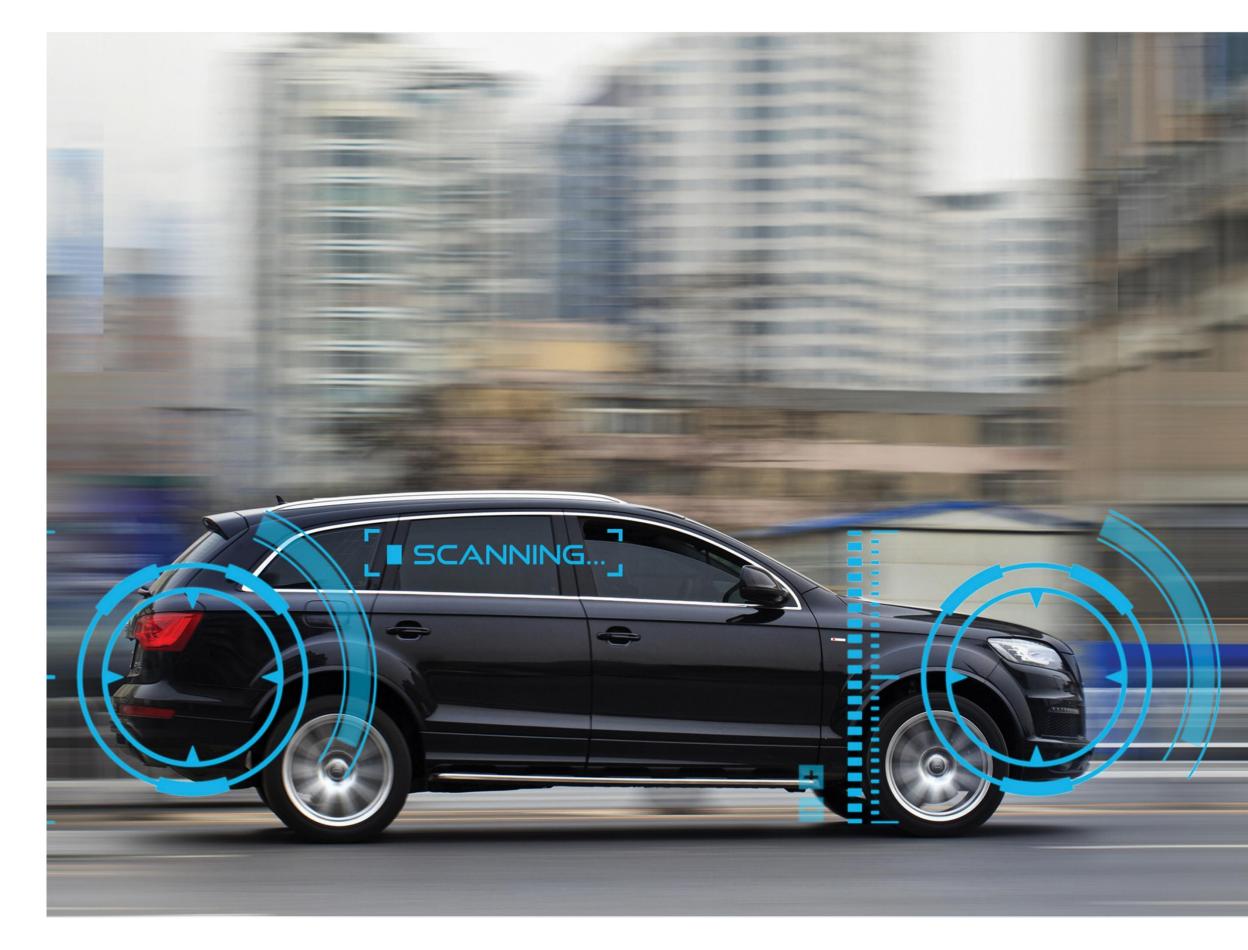






# What is Thematic Investing

Investing in companies across sectors and countries that are going to benefit from long term structural changes in the economy



# Thematic Investing – Vues



- Macrovue's approach is to create portfolios of 10 stocks each called Vues that give you exposure to the theme.
- Unlike an ETF, the stocks are picked by our research analysts.
- Actively reviewed and periodically rebalanced.
- Investing is benchmark aware.







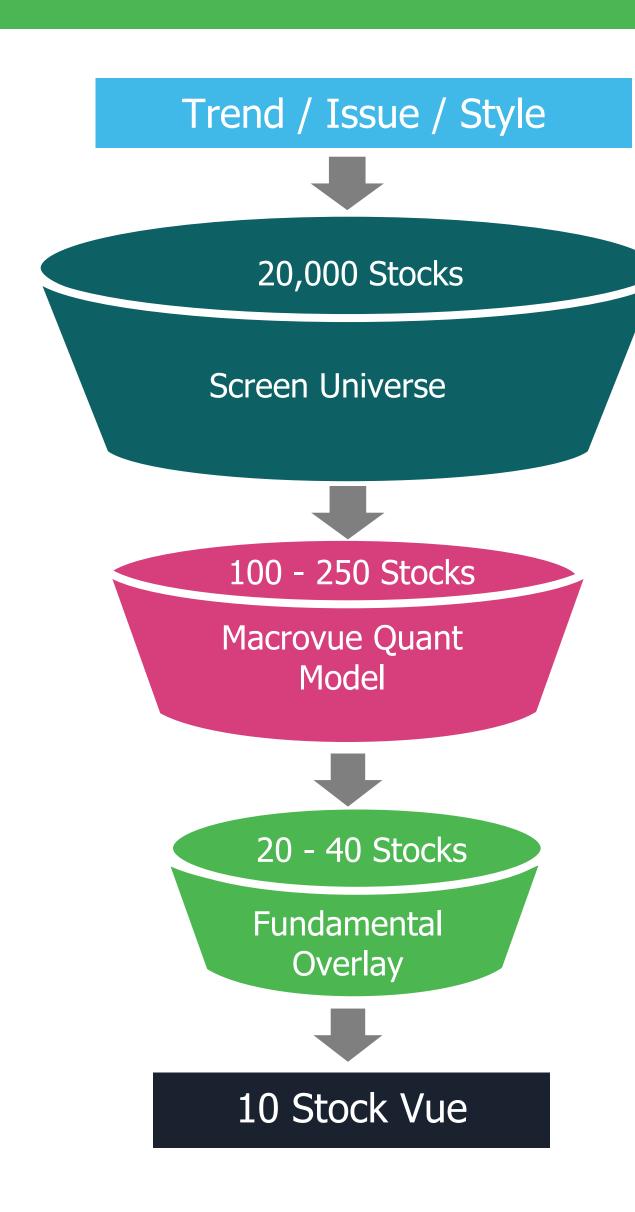






## Vue Portfolio Construction Process





Our proprietary multi-factor portfolio construction process is what makes our portfolios an attractive investment

# Vue: Car of the Future

#### Step 1

20,000 stocks are screened based on the investment trend and style. Taking into consideration factors such as:

- Market Capitalisation
- Liquidity
- Dividend yield and other factors.

- Market Capitalisation: >US \$1bn
- Liquidity: > US \$1mn
- Exposure to theme: revenues derived from auto industry.

#### Step 2

50 to 250 stocks are scored and ranked using Macrovue's Quantitative model / filtering system. Top 40% companies are then chosen. The ranking system is based on fundamentals such as earnings, cash held, balance sheet, etc.

• We arrive at ~60 stocks at this stage.

#### Step 3

20 to 40 stocks are fundamentally researched and analysed ensuring the companies have strong and sustainable fundamentals and are diversified by geography, industry and company size.

Post quant filter, we get to
 ~20-25 stocks.

#### Vue

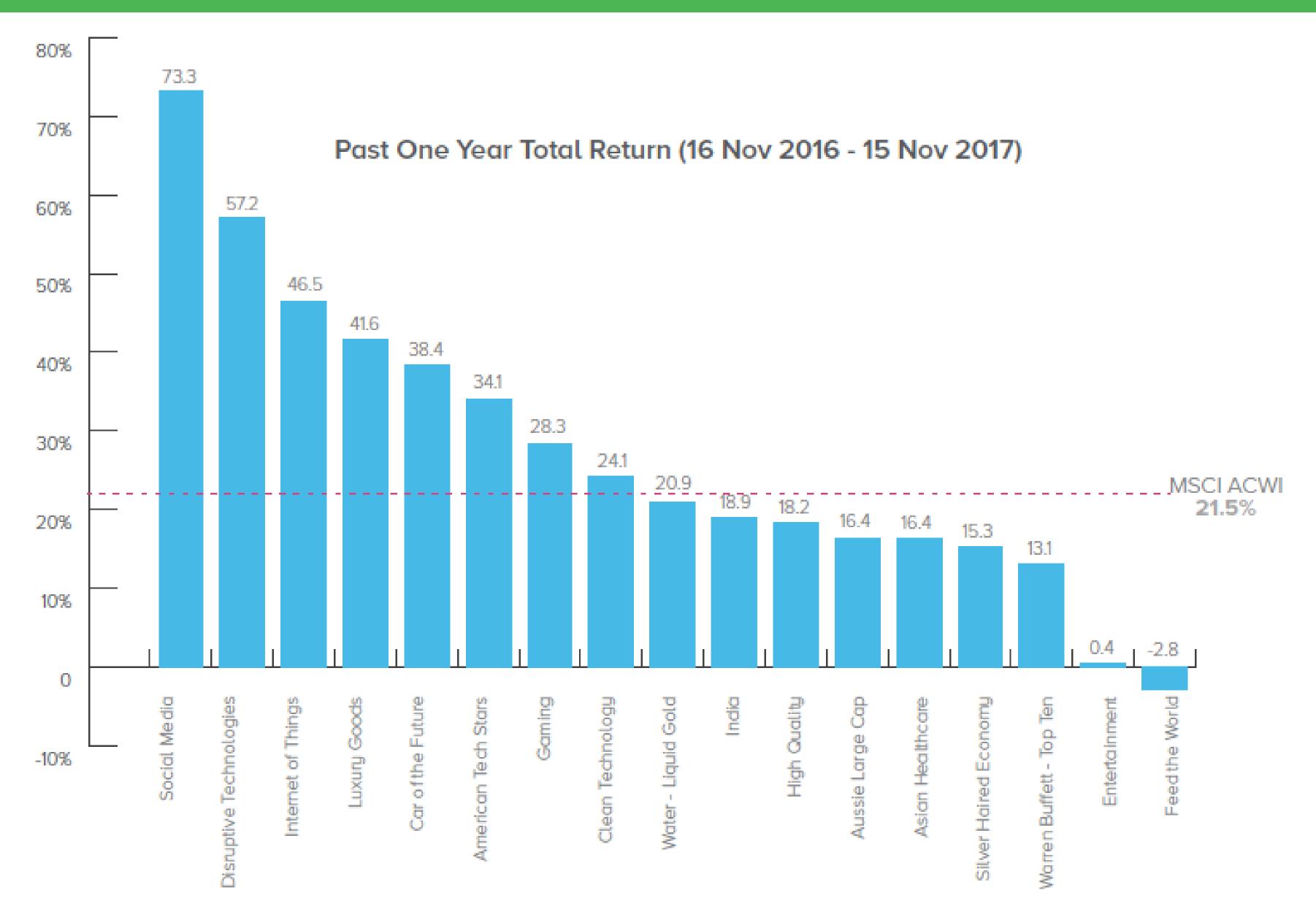
Only the 10 best stocks are picked to create the Vue. They are then monitored and regularly reviewed to meet the goals of the Vue based on trend, issue or style.

#### Result

The final 10 stocks are picked based on fundamentals & considerations for diversification.

# Vue Returns





# The Car of the Future Vue



• Concentrated portfolio of ten stocks to invest across the value chain of the car of the future – EVs and autonomous vehicles.

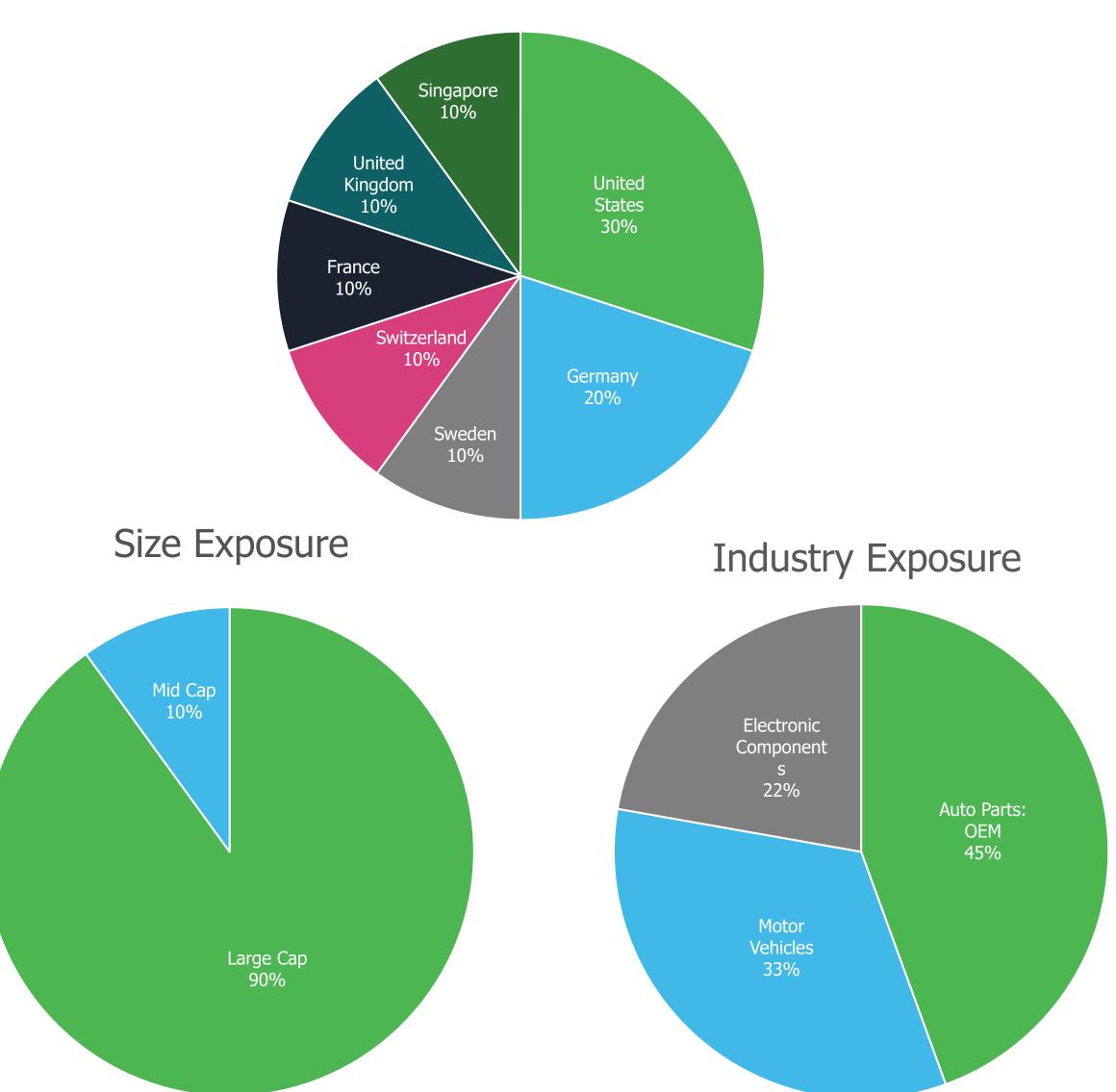
 A mix of mature defensive dividend paying companies and high growth technology players.



# Diversification within the Theme







- Current bias towards larger companies, 90% of the portfolio is in names with a market capitalisation greater than US\$10 bn
- Currently only developed market exposure – dominated by Europe (60%) and US (30%)
- Exposure to auto parts suppliers also gives exposure to conventional ICE vehicle market as well.

# Companies in the Vue



### COMPONENTS

## **AUTOMAKERS**



French manufacturer of auto parts supplying components to automakers as well as the aftermarkets.



US based automotive components and parts supplier, primarily involved in manufacturing products for IC engines, electric motors as well as drivetrains.



US based manufacturer of electrical/electronic architecture, powertrain systems for EVs and IC vehicles.



Swedish manufacturer of safety systems for automakers globally with products like radars, night vision systems, airbags and seatbelts.



German luxury carmaker of Mercedes Benz that has planned to offer an electric variant of every one of their models by 2020

### **AUTOMAKERS**



Pioneer in manufacturing electric vehicles & electric powertrain components. Aims to roll out 500K EVs by 2018.



General Motors is the most progressive automaker among the US Big 3 in developing EVs with their Chevrolet Bolt model. Also investor in Lyft.



German company which manufactures semiconductor products that are used in powertrains, safety systems and comfort electronics for cars.

## **TECHNOLOGY**





Headquartered in Singapore, it is one of the world's largest electronics manufacturing services companies. Provides components for advanced driver assistance systems (ADAS) and infotainment.

World's largest manufacturer of sensors. US based technology company supplying sensors and connector systems for vehicles (including hybrids and EVs) as well as charging stations.

# How to Invest in Vues

 Macrovue has a mult-currency/multi-exchange investment platform that allows you to invest directly in Vues.

• Open and API driven architecture means that we can make Vues available to different IDPS platforms. Can provide research or international brokerage.

 Also available through investment consulting arrangements for MDA licensed advisers or bespoke research assignments.

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