

# Narrowing the Universe: thematic investment in practice

Jerry Thomas



## Investment philosophy



DISTINCTIVE  
THEMATIC  
APPROACH



INTEGRATED  
STEWARDSHIP

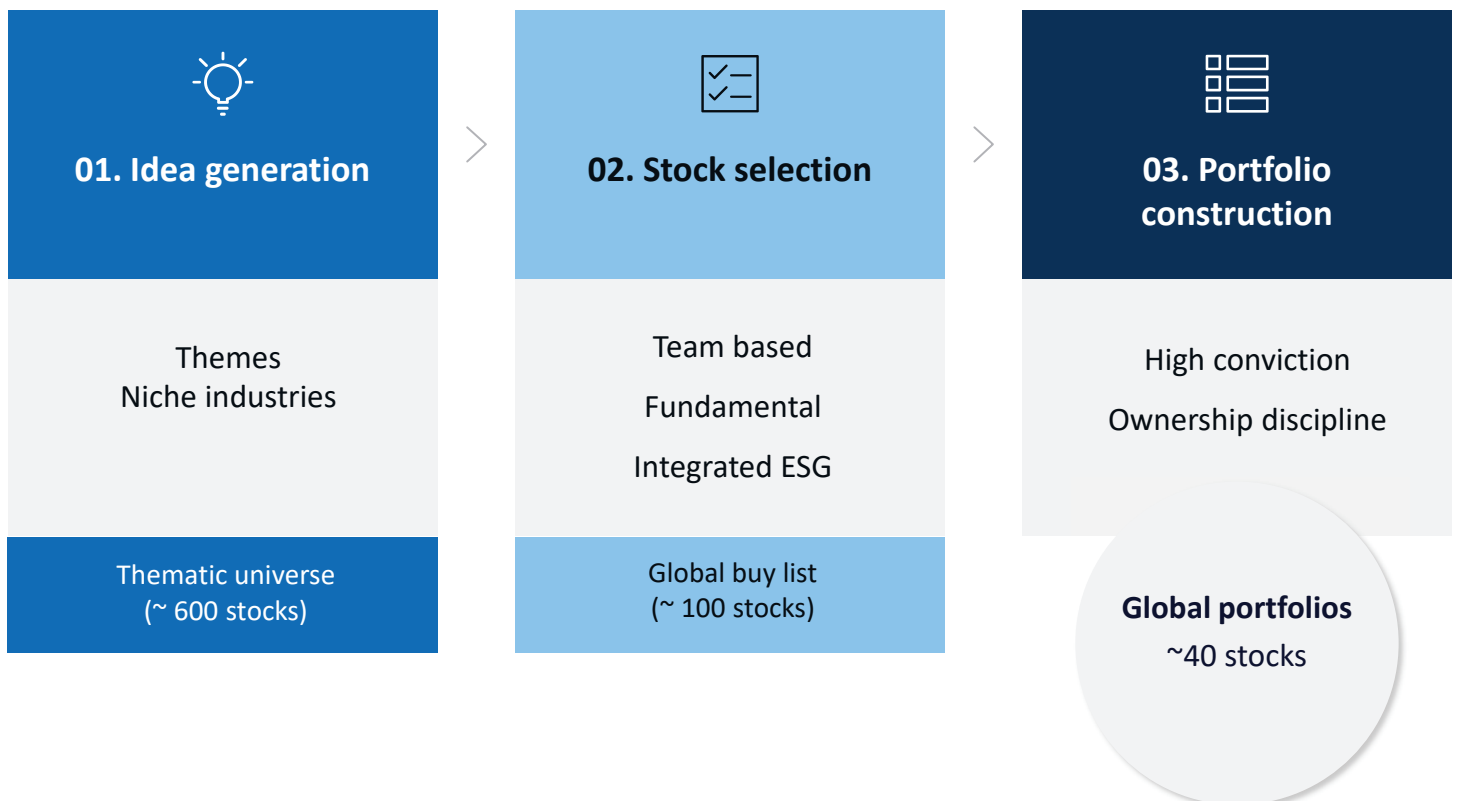


ACTIVE  
LONG-TERM  
OWNERSHIP

# Team introduction

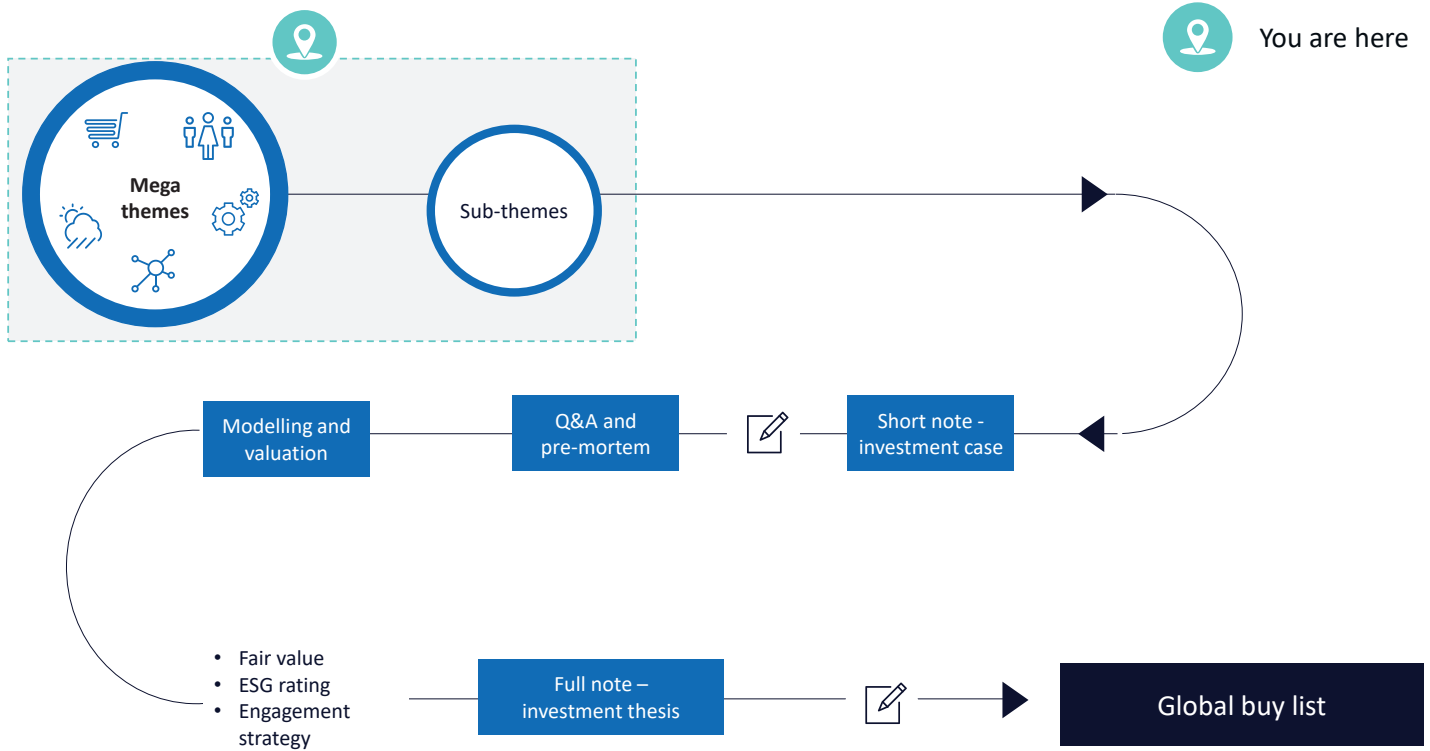
Global Thematic Equity Investment Team				
	<b>Stewardship / ESG</b>	 Natasha Landell-Mills (25/7)	 Kwai San Wong (9/4)	 Therese Kieve (11/1)
	<b>Digitalisation</b>	 Josh Sambrook-Smith (13/6)	 Rolando Rodrigues (23/10)	
	<b>Automation</b>	 Alex Cobbold (32/3)	 Jerry Thomas (24/3)	
	<b>Ageing</b>	 Alex Hunter (30/13)	 Neil Denman (18/2)	
	<b>Evolving Consumption</b>	 Giles Money (16/4)	 Jeneiv Shah (14/3)	
	<b>Climate Change</b>	 Ben McEwen (15/3)	 Alex Bibani (16/4)	
	<b>Other team members</b>	 Angel Ganchev (Quant Analyst, 5/1)	 Brook Harris (Trainee Analyst, 2/2)	

# 3-step investment process



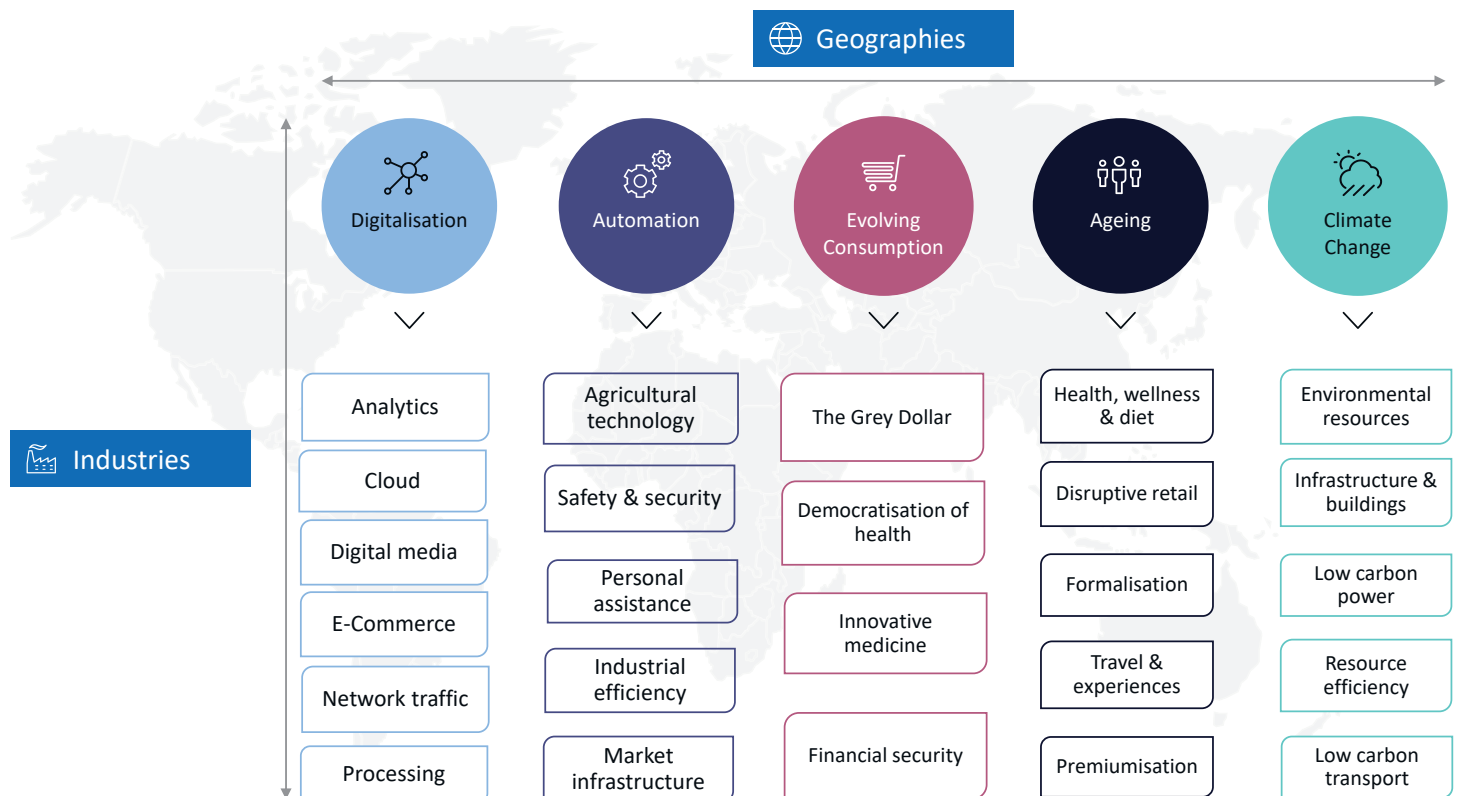
# Stock selection

## Research process



# Idea generation

## 5 mega-themes and 25-30 sub-themes



# Important information

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