

# Identifying opportunities from the rise of Artificial Intelligence

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With enormous potential that continues to oscillate between hope and promise, AI stands at the cusp of a wave of adoption and disruption not seen since the introduction of the internet. While few companies do not claim that they will benefit materially from AI, the reality will likely be more nuanced with clear winners and a myriad of companies where reality fails to live up the promises given. Getting this right will be crucial for investors over the next decade, and therefore this presentation will provide insights into which companies that are likely to see the greatest potential for value creation from the rise of AI and indirectly through the buildout of the AI infrastructure.

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