

ASSET MANAGEMENT

Investing in an Automated World
Credit Suisse (Lux) Global Robotics
Equity Fund



Investing in an Automated World

We are on the verge of a wide-scale technological revolution driven by ground-breaking advances in robotics, artificial intelligence and automation.

The Credit Suisse (Lux) Global Robotics Equity Fund provides clients with the opportunity to invest in pure-play companies well positioned to benefit from this long-term secular growth trend.



Why robotics?

Automation, quite simply, is the most significant growth story in the modern industrial world. Changing demographics, coupled with the ongoing industrialization of emerging economies, will continue to push automation to new levels.

Various challenges, such as rising quality and safety standards and regulations, as well as the need for ever greater productivity and efficiencies, can be met with increasingly sophisticated robotic systems.

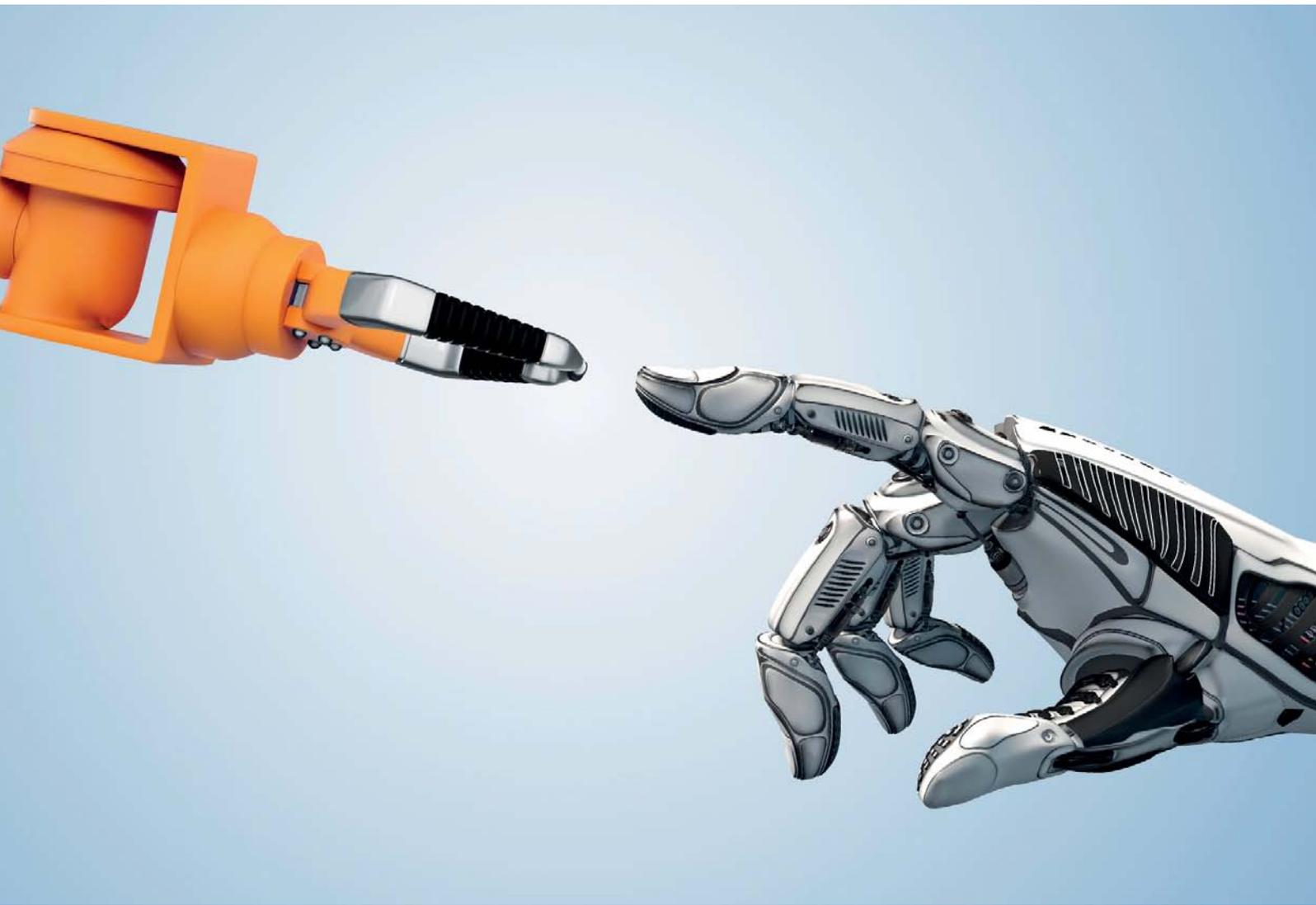
No surprise, then, that the investment universe for the robotics sector has outstripped the broader equity market – a trend we expect to continue for many years to come.

Historical performance indications and financial market scenarios are not reliable indicators of current or future performance.

Potential to deliver superior returns

MSCI World	66%
Robotics investment universe	271%

Source: Credit Suisse / Factset
Performance measured from 31.12.1999 to 30.09.2016.



Why now?

The numbers show that this is now becoming an attractive secular megatrend. With great potential market expansion on the horizon, investors can gain early exposure to accelerating growth in an increasingly important area.

But the robotics theme is not just about labor costs and the need to improve productivity in the traditional industrial setting. With the cost of technology used in these automated systems declining, robots are being adopted more and more broadly in many walks of life. Increasingly we see robotics and automation employed in shops, restaurants and offices, in hospitals and by governments, in our cars, trains and planes, and even in our homes. Many systems are becoming such an integral part of our daily lives that structural changes in the behavior of society are evident.

From an investment view point, we see significant long-term opportunity in the further adoption of robotics in an industrial setting, as well as by more novel adoption of automation by many other segments of the economy.

“Increasing automation generates additional productivity gains. This is, in our opinion, one of the most important sources of economic wealth creation.”

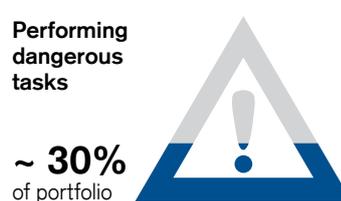
Angus Muirhead,
Senior Portfolio Manager

How do we invest?

The fund's objective is to achieve long-term capital growth through active investment management, while maintaining an adequate diversification of risks. Stocks are selected through a bottom-up process, based on fundamental analysis – this means focusing on company specifics, rather than the industry or country in which it operates.

Quantitative, qualitative and growth factors are examined, in conjunction with internal and external research, discussion with analysts, and regular company visits.

Our global approach, with a focus on three high-growth sub themes



Source: Credit Suisse

The fund invests in companies with at least 50% of sales attributable to robotics, automation, artificial intelligence, or security.

- Focused portfolio of 30 to 60 stocks
- Maximum allocation of 3% to 4% per individual stock
- Up to 40% in emerging markets
- Selected defense-related companies are excluded, based on their products/ services
- Benchmark-agnostic approach

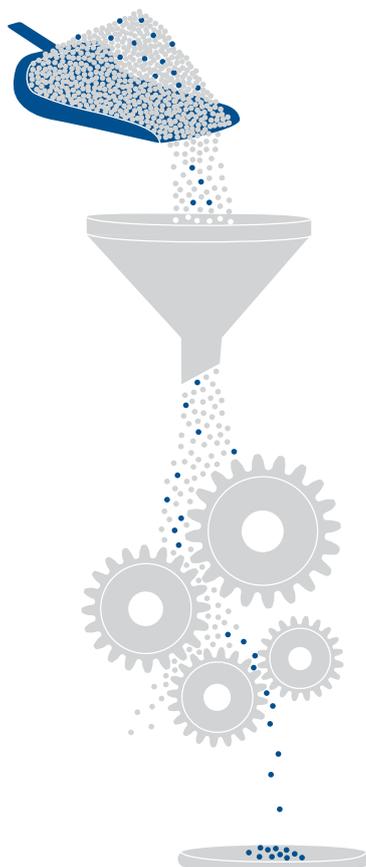
Our investment universe

Global equity universe
~ **40,000**
listed companies worldwide

Broad universe
~ **290** companies
with material revenues
attributable to
the robotics sector

Investable universe
~ **140** stocks

Portfolio construction
30–60 stocks



1 In the first step, we screen the global equity universe of around **40,000** listed companies worldwide to identify those active in the robotics sector.

2 Based on careful analysis, supported by internal and external research, discussion with analysts and regular company visits, the broad universe of around **290** stocks is quantitatively and qualitatively screened.

3 When defining the investable universe of around **140** stocks the strict criterion that at least 50% of the companies' revenues must be related to robotics, automation or artificial intelligence is implemented.

4 A high-conviction concentrated portfolio of **30 to 60** stocks is arranged on a bottom-up basis driven by fundamental research.

For illustrative purposes only.
Source: Credit Suisse

Fund Details

The Credit Suisse (Lux) Global Robotics Equity Fund offers investors access to pure-play companies positioned to benefit from the long-term secular growth dynamics of the robotics, artificial intelligence and automation industry.

Key facts

Fund domicile	Luxembourg
Legal structure	SICAV
Portfolio manager	Angus Muirhead, Dr. Patrick Kolb
Fund currency	USD
Benchmark	MSCI World (NR)
Subscriptions/redemptions	Daily, with cutoff at 15:00 CET
Initial charge	Max. 5.00%

Share class	Valor no.	ISIN	Management fee p.a.	Minimum investment	Distribution
USD B	30633552	LU1330433571	1.60%	None	Accumulating
USD IB	27419875	LU1202666753	0.90%	USD 500,000	Accumulating
USD UB	30633883	LU1330433738	1.00%	None	Accumulating
USD UA	30633888	LU1330433811	1.00%	None	Distributing
USD EB	27420462	LU1202667561	0.90%	None	Accumulating
EUR BH	32800528	LU1430036985	1.60%	None	Accumulating
EUR AH	36830090	LU1616779572	1.60%	None	Distributing
EUR EBH	35916491	LU1575199994	0.90%	None	Accumulating
CHF BH	32800527	LU1430036803	1.60%	None	Accumulating
CHF UBH	32800552	LU1430037280	1.00%	None	Accumulating
SGD BH	36447024	LU1599199277	1.60%	None	Accumulating

Risks

- The investor may lose part or all of the invested amount.
- Focus on companies active in the robotics sector can lead to significant sector/regional exposure.
- A slowdown in the global economy might impact the robotics sector.
- Liquidity risk (exposure to small caps).
- Equity markets can be volatile in the short term.
- Due to the possibility of increased exposure to emerging markets, the fund may be affected by political and economic risks in these countries.

Want to find out more?

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16%

**increase in industrial
robots sales in 2016**

Source: IFR International Federation of Robotics; World Robotics 2017 Industrial Robots

“ The robotics investment universe has the potential to deliver superior returns than the broader equity market over the long term, with the global robotics market expected to grow by around 10% a year until 2025.”

Source: bcg.perspectives, The Rise of Robotics



Your contact

Asset Management Fund Distribution will be pleased to answer any questions you may have.

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Source: Credit Suisse, unless otherwise specified

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