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Thematic Certificate Smart AI

Artificial Intelligence (AI) is revolutionizing our world at an unprecedented pace. As the driving force behind technological innovation, AI is transforming entire industries, redefining the way we live and work. For savvy investors, it represents not only an opportunity for attractive returns but also a chance to shape the future. Explore how AI is influencing our daily lives, the investments required to support its expansion, and the opportunities it presents in the global market.



Equity Certificate

Name: Smart AI

ISIN: CH0359281273

Features

Currency: USD

Legal structure: open-end

Issuer: BCV

Management fees: 1%

Launch date: 09/01/2024

Number of securities: ~30-50

Management type: active

Universe: Actions Monde

Dividends: reinvested

Portfolio manager : Daniel Steck

The Impact of AI on Our Lifestyle

AI is infiltrating every aspect of our daily lives, transforming how we interact with technology and each other. From virtual assistants like Siri and Alexa to personalized online shopping experiences, AI is enhancing the efficiency and ease with which complex tasks are carried out. In healthcare, deep learning algorithms enable early and accurate diagnostics, while transportation is moving toward autonomy with intelligent vehicles. This technological transformation is reshaping the labor market, requiring new skills and generating jobs in emerging sectors. For companies, adopting AI is essential to remain competitive in an increasingly digital environment.

Significant Capital and Investments Required

The development and integration of AI require significant capital expenditures (capex). Companies must allocate substantial resources to research and development, digital infrastructure, and workforce training. By 2030, global AI spending could reach \$1 trillion, reflecting the growing importance of this

technology. Governments also play a key role in supporting innovation. For investors, it is crucial to

identify companies and sectors that demonstrate the capacity to innovate and integrate AI into their business models.

Global Investment Opportunities in the Coming Years

The global AI market presents considerable investment opportunities across various sectors. Financial technology (FinTech) is leveraging AI for risk management and portfolio optimization. In the healthcare sector, AI accelerates drug development and improves clinical outcomes. Furthermore, the rise of green and sustainable technologies is propelled by AI, optimizing resources and reducing carbon footprints. For investors, diversifying portfolios by including leading AI innovators while monitoring trends and regulations shaping this dynamic landscape is a strategic approach. AI, as a driver of change, promises to redefine investment opportunities for decades to come.

Our Investment Solution: A rigorous Approach

Investing in artificial intelligence requires a disciplined approach that combines an understanding of the underlying technologies with rigorous financial analysis. It is also essential to differentiate between the various segments of the AI market. Investment opportunities mainly fall into companies developing AI algorithms, those providing the infrastructure and technology hardware, and firms integrating AI into their operations to enhance efficiency.

Companies specializing in the development of semiconductors and processors optimized for machine learning are crucial investments. Similarly, firms offering cloud computing platforms with AI capabilities are benefiting from the growing demand for these services.

Finally, diversifying investments across different AI segments and maintaining broad geographical exposure, including emerging markets where AI is rapidly growing, helps mitigate risks. It is also advisable to combine investments in established tech companies with innovative startups.

The Smart AI certificate offers investors exposure to a structurally significant theme that remains undervalued by the market, alongside Piguet Galland's expertise in financial analysis and thematic portfolio management.



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your
service.**

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