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Investing today in the world of tomorrow

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Investing in companies that benefit from long-term, structural trends can help investors strengthen the resilience of their portfolios and position themselves for long-term wealth accumulation.

In a world where headlines change hourly and markets react in real time, it's easy to lose sight of what's essential: The drivers that may be decisive for the world of tomorrow. History shows that major investment opportunities can be identified early by focusing on structural changes that quietly—and then suddenly—redefine the future.

Today, many Swiss investors face a challenging environment: With the Swiss National Bank's policy rate at 0% since June 2025, the franc as one of the world's strongest currencies, economic uncertainty, and ongoing political and geopolitical risks, investing is often not easy. Moreover, valuations in equity and bond markets leave little room for negative surprises.

In this environment, we advise investors to remain defensively positioned but also to consider longer-term perspectives. One of our preferred investment themes is attractively valued dividend stocks with dividend growth, especially in the Swiss and European markets. At the same time, good international diversification is essential. Another opportunity for investors lies in companies at the forefront of transformation, driving profound economic and societal changes. Such developments can be easily overlooked, especially when daily news is dominated by sometimes populist headlines. We see three Transformational Innovation Opportunities (TRIOs) at the heart of the next decade: *Artificial intelligence* (AI), *Power and resources*, and *Longevity*.

Innovation has always been a driver of sustainable equity performance. From steel to the internet, breakthroughs in every era have produced new market leaders. Today, AI not only learns from us but also evolves independently. Electrification powers everything from data centers to electric vehicles, reshaping infrastructure. And as people live longer and healthier lives, longevity is transforming entire industries.

These are not short-term trends; they are structural changes. Take artificial intelligence: Our analysts expect global investment in AI to rise by more than 60% this year alone, reaching USD 375 billion, with over USD 500 billion anticipated by 2026. Early adopters are already achieving productivity gains, such as AI-supported employees saving more than 5% of their working time. The global market for AI products and services is projected to reach USD 2.6 trillion annually by 2030.

Electrification is another force reshaping the global economy. Annual investment in electrification infrastructure is expected to reach USD 3 trillion by 2030, based on International Energy Agency data. Demand for electricity is rising—not only due to the energy transition but also because of the digital revolution itself. The energy required to cool a single modern data center would be enough to melt 40,000 tons of ice per day.

And on the topic of longevity: Annual revenues from the longevity economy could reach USD 8 trillion by 2030, according to our forecasts. Breakthroughs in medicine—from obesity drugs to cancer therapies—are changing our understanding of aging. The global health care sector's market opportunity could reach USD 2.2 trillion by 2030, driven by demand for treatments for obesity, oncology, Alzheimer's, and cardiovascular diseases.

We are convinced that companies and sectors at the intersection of these themes will drive sustainable, secular growth—growth that endures far beyond short-term volatility. How can this perspective be put into practice? By combining core holdings in high-quality Swiss dividend stocks with satellite investments in TRIOs, we believe investors can strengthen portfolio resilience and position themselves for long-term wealth accumulation—even if short-term gains remain limited due to macroeconomic and political headwinds. In periods of heightened volatility, investors can also benefit from structured strategies, such as writing put options or capital preservation strategies.

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