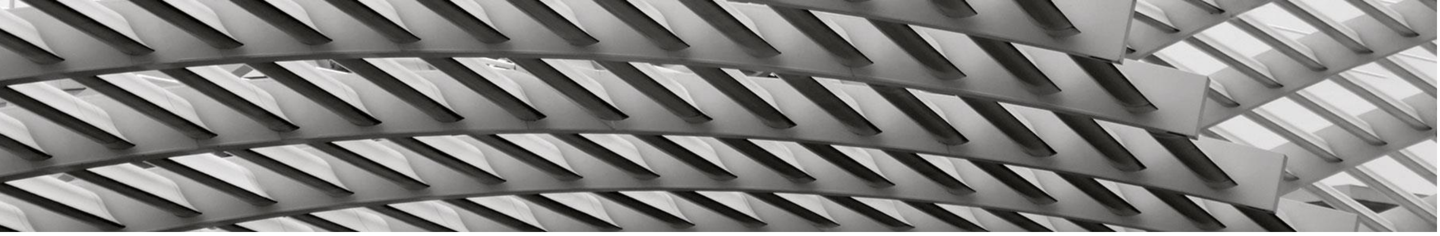

ARTEMIS
The PROFIT Hunter

Is the US still the land of opportunity?

We believe we are at the tail end of an economic cycle, with the delayed impact of financial tightening about to take its toll. At the same time, major government spending programs aimed at rebuilding, reshoring or decarbonising America, are just starting to benefit sectors from infrastructure and semiconductors through to defence and utilities. This combination of great uncertainty and divergent fundamentals we believe present a fruitful environment for the conviction stock picker. In his presentation, Adrian Brass explains why the Artemis US Extended Alpha fund is a differentiated offering both in terms of holdings and scope.

The presentation will discuss the following:

1. The current US economic and market backdrop
2. The Artemis US Extended Alpha fund process
3. Why this environment presents substantial alpha generation opportunity

Adrian Brass Fund Manager Artemis US Extended Alpha Fund

Adrian manages Artemis' 'US Extended Alpha' long/short strategy alongside co-managers James Dudgeon and William Warren. He was the lead manager of Majedie Asset Management's US Equity fund and co-manager of its Global Equity and Global Focus funds from 2014. Prior to Majedie, Adrian was a fund manager at Fidelity, managing US equity funds including its America fund, for six years. He holds a bachelor of science degree in economics and politics from the University of Bristol and is a CFA charterholder. Adrian joined Artemis in 2022.

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