

HM1 2020 Sohn Hearts & Minds Conference Recommendations

Recommendations from the Sohn Hearts & Minds Investment Leaders Conference, which was held virtually on Friday, November 13, 2020.

Company	Ticker Code	One line description
Bill.com Holdings, Inc.	BILL	Improving back office processes for SMEs
CSL Limited	CSL.AX	Develops pharmaceutical and diagnostic product from human plasma
Dish Network Corporation	DISH	Satellite and interactive television services
Fisher & Paykel Healthcare Corporation Ltd	FPH.AX	Designs humidification products / systems for respiratory care
Hello Fresh SE	HFG.DE	Fresh food meal kit delivery service
Nintendo Co., Ltd.	7974.T	Video game developer in Japan
Ping An Healthcare and Technology Company Limited	1833.HK	Chinese mobile platform for healthcare and hospital referrals
Shenzhou International Group Holdings Limited	2313.HK	Chinese textile manufacturer with Nike, Adidas, Uniqlo and Puma as its main customers
Slack Technologies, Inc.	WORK	New age email / real time messaging platform for companies
T Mobile US, Inc.	TMUS	National wireless carrier in the US
Target Corporation	TGT	Discount retailer with a very strong e-commerce platform
Teladoc Health, Inc.	TDOC	Phone / video consultations for visits to the doctor
Temple & Webster Group Ltd	TPW.AX	Online furniture and homeware business
Treasury Wine Estates Limited	TWE.AX	Manufacture and selling of Aussie wine around the world
Yeakha Limited	9923.HK	A Chinese mobile/app payment service, that uses QR (and other) codes that allow merchants to capture the various payment alternatives

This communication has been prepared by Hearts and Minds Investments Limited (ABN 61 628 753 220). In preparing this document the investment objectives, financial situation or particular needs of an individual have not been considered. You should not rely on the opinions, advice, recommendations and other information contained in this publication alone. This publication has been prepared to provide you with general information only. It is not intended to take the place of professional advice and you should not take action on specific issues in reliance on this information.