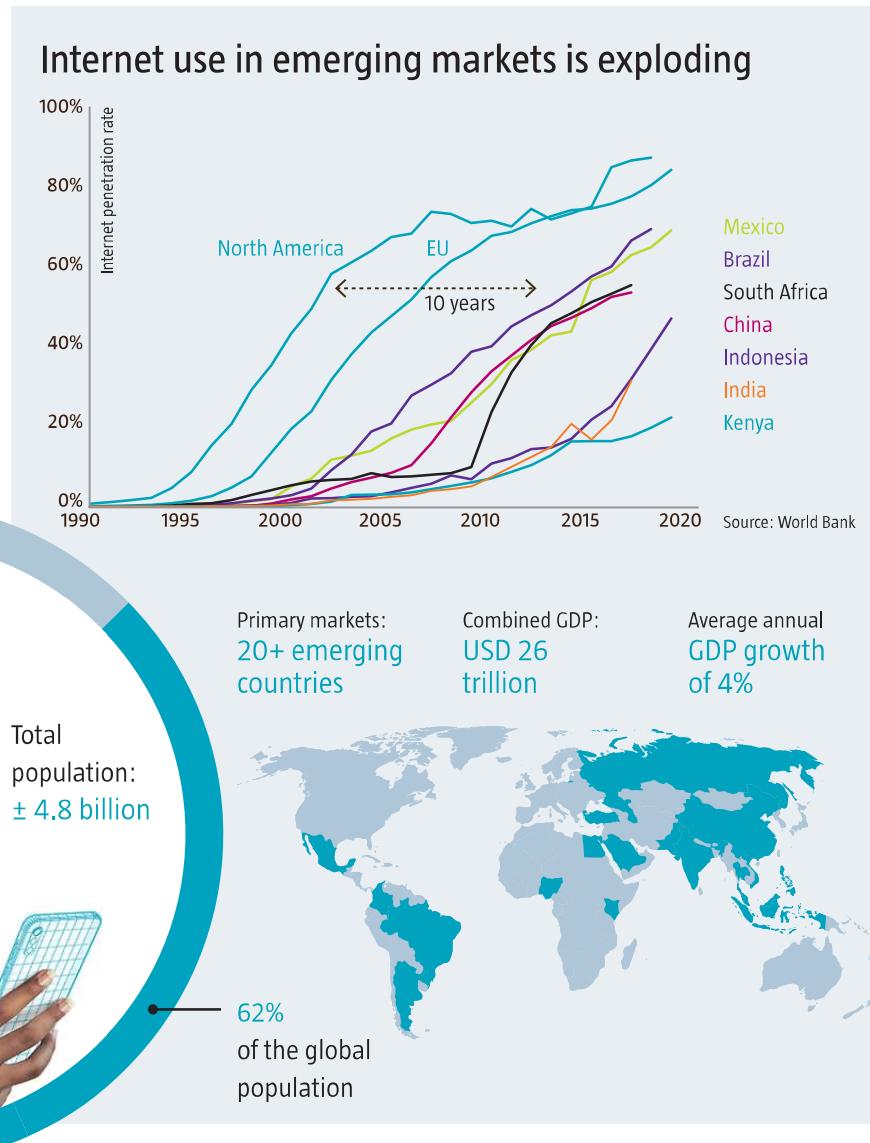


Robeco Next Digital Billion

Capitalize on the next wave of internet users in emerging markets

Let's have a look at the new wave of internet users. Over one billion people are about to join the internet, most of them located in emerging markets.

The share of the population using the internet is following a similar path to what we saw in developed markets previously. This trend is ongoing and presents new opportunities today.



Take advantage of this next wave with the Robeco Next Digital Billion strategy:

a unique emerging markets tech trends

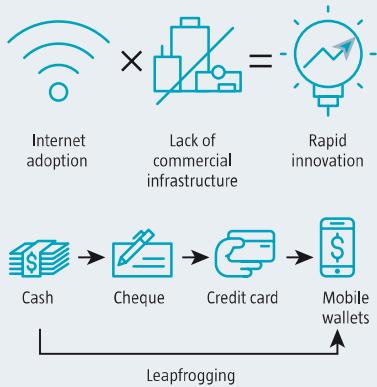
solution that offers exposure to a differentiated universe of the world's next internet platforms.

Tomorrow's tech winners

Internet and technology adoption in emerging markets is giving rise to local champions

Benefit from the 'leapfrog effect'

The rise in internet connectivity, combined with a lack of pre-existing commercial infrastructure, is leading to exponential leaps in technology adoption and business model growth.



This increase in internet adoption is facilitating a 'leapfrog effect'. Given this trend, new businesses are being created every day to cater to the next wave of internet users.

Meet the next local champions

We're offering investors access to high-growth technology and internet companies across emerging markets. These businesses have long-term growth potential as they cater to the needs of young, mobile-first and tech-savvy populations.



Most people have heard of...



...but most people have not yet heard of these local platforms:



This is not a buy, sell or hold recommendation for any particular security. The information is for illustrative purposes only. No representation is made that these examples are past or current recommendations, that they should be bought or sold, nor whether they were successful.

The technological disruption underway in emerging countries offers us the

opportunity to invest

in digitally native companies that have the potential to create long-term value for investors.

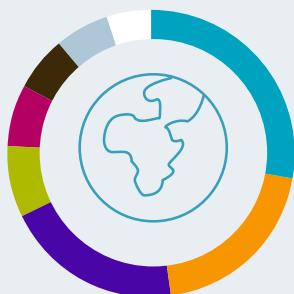
Long story short

The Robeco Next Digital Billion strategy is built to benefit from digitalization in emerging markets

A high conviction portfolio...

From a broad universe of over 300 companies with an average market cap of USD 40 billion, the portfolio typically consists of 30-50 stocks that we perceive as the potential long-term winners in their respective industries.

...with diversified emerging markets exposure beyond China



■ East Asia	■ Sub-Sah. Africa
■ Latin America	■ Southeast Asia
■ Central & Eastern Europe	■ Middle East/ North Africa
■ South Asia	■ Global (Pan EM)

Based on a representative portfolio, as per August 2021. Positions subject to change.

Sustainability profile



We integrate ESG analysis at every step of the investment process



We vote on ESG issues & engage with investee companies



We exclude controversial stocks from our investment universe



SFDR classification: this is an Article 8 investment strategy

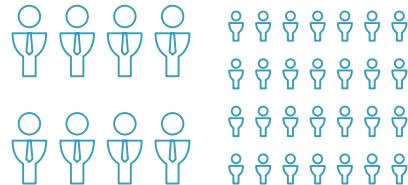
Managed by our highly experienced investment team



Bryan Satterly
Portfolio manager



Michiel van Voorst
Portfolio manager



Combined emerging markets and trends expertise with VC and public equity knowledge

Broader team of >25 fundamental emerging markets equity investors, a broad network of VC/PE specialists, regulators, and more

Are you interested in the Robeco Next Digital Billion strategy? Be the first to capitalize on the

next wave of internet users

and don't miss out on this investment opportunity.



[Strategy page](#)



[Contact](#)

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