



Friday 3 December 2021

The Manager
ASX Market Announcements
ASX Limited
Exchange Centre
Level 4, 20 Bridge Street
Sydney NSW 2000

Dear Shareholders,

Please find attached information about Hearts and Minds Investments Limited's (HM1) 2021/2022 Conference Portfolio.

For and on behalf of the board,

A handwritten signature in blue ink, appearing to read "T. Bloomfield", is written over a light blue horizontal line.

Tom Bloomfield
Company Secretary

HM1 2021/2022 Conference Portfolio

Hearts and Minds Investments Limited (HM1) advises that, in line with its investment strategy, it will be refreshing its Conference Portfolio over the coming weeks. The Conference Portfolio which represents 35% of HM1's total investment portfolio is made up of stocks pitched at the annual Sohn Hearts & Minds Investment Leaders Conference. Stocks in the Conference Portfolio are generally held for a period of 12 months. Stocks in the Conference Portfolio that were acquired last year are currently being sold.

The latest Sohn Hearts & Minds Investment Leaders Conference was held today, on Friday 3 December 2021. HM1 will be investing in the stocks pitched at this year's conference. The stocks that will be acquired for the Conference Portfolio are:

Company	Ticker Code
Avalara, Inc.	AVLR
Bengo4.com, Inc.	6027.T
Coinbase Global, Inc.	COIN
Delivery Hero SE	DMER.DE
GitLab Inc.	GTLB
Megaport Ltd	MP1.AX
ON Semiconductor Corporation	ON
Pinnacle Investment Management Group Ltd	PNI.AX
Spotify Technology S.A.	SPOT
Techtronic Industries Company Limited	0669.HK
The Beauty Health Company	SKIN
Wise PLC	WISE.L

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