

DOMINION

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*netcomm
suisse*
e-commerce association

DOMINION

GLOBAL TRENDS

We are an international fund manager specializing in capturing investment opportunities in a rapidly changing world. [We identify the most important Global Trends and invest in those companies that are best placed to benefit from a fundamental reshaping of our futures.](#) We are singularly committed to achieving better than average returns for investors in our family of Global Trends Funds over the medium to long term.



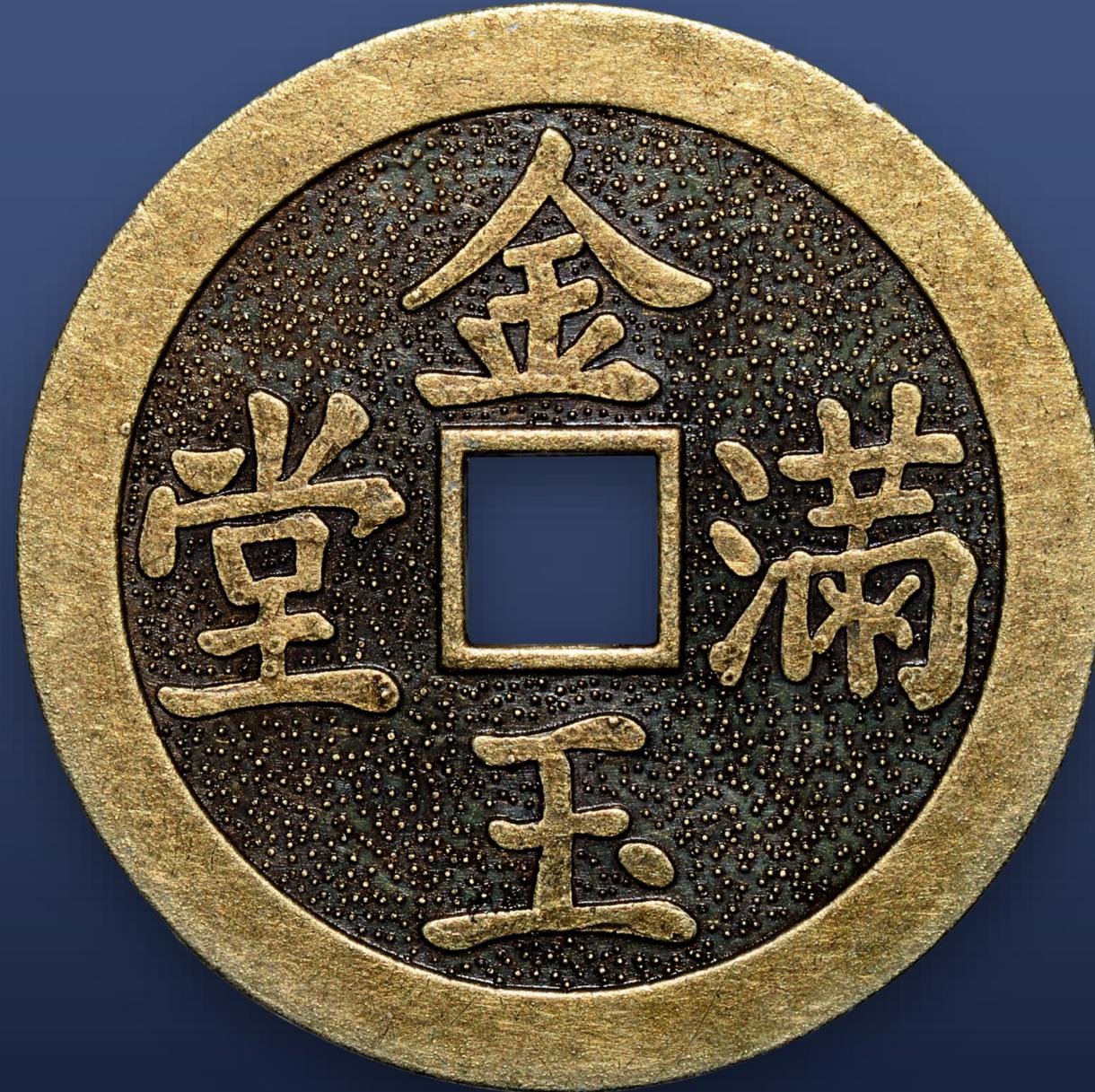
We have a
big interest
in fashion

In fact, it's **massive.**



There are 640 million internet users in China

65% of shoppers
shop online



China is the worlds
largest market for
Ecommerce sales

Source: Hosting Facts

Just E Com On Line Shopping Sales in 2016: over \$ 2 trillion

E Com sector is expected to add \$17 trillion to the US Economy by 2027

E Commerce is the Fastest growing sector globally

Background to the sector

Made possible by the internet

Just over 20 years ago this sector did not exist

It is totally disruptive to everything that we understand about traditional business:

Uber vs Taxis, **Hotels vs Air B&B**, Supermarkets vs home delivery,

Shopping Mall vs On Line, **TV vs On demand streaming**,

Game Consoles vs On Line games, Cash vs Pay Pal, Apple Pay, **Banking vs On Line banking**,

Paper Applications vs Fin Servs Platforms, Newspapers vs On Line News Apps

The coming of age of the Digital Citizens

DIGITALIZERS



100% of teenagers with internet access will use the internet for products and services.

They speak a new language called...

SOCIAL

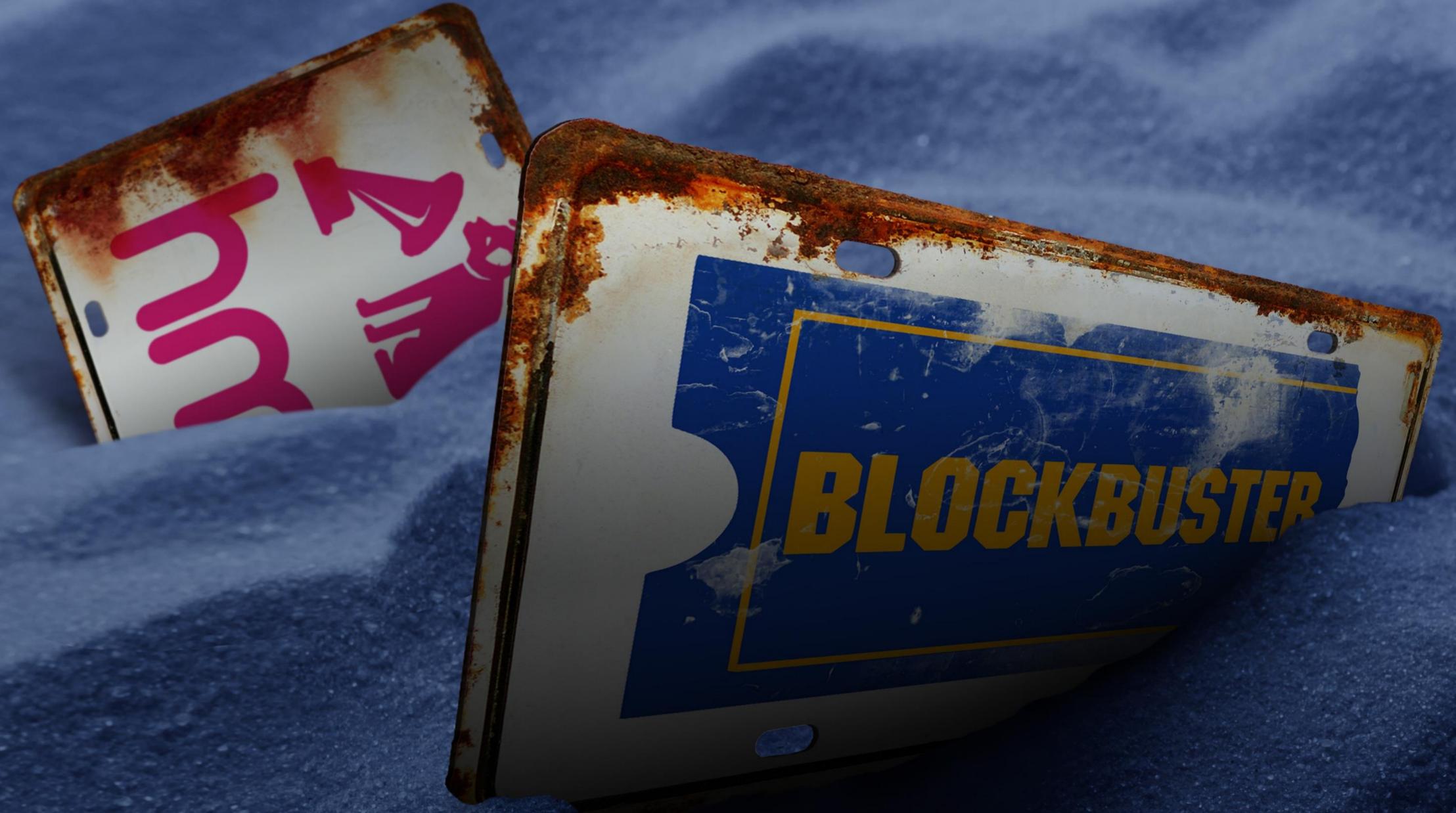
93% of teenagers with internet access use social media



Blockbuster
killed by Netflix
Virgin Music
killed by Spotify
HMV Music Stores
Killed by Apple Music

Just a few major players that are now distant memories because they failed to embrace change:





In 2015, Netflix users
streamed
42.5 billion
hours
of content in a year

YouTube users watched
72 billion
hours





In 2015,
the video game
market was worth
\$1.93 trillion globally

It is bigger than the
global film & music
industry **combined.**

Source: Statista



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Fact:

On Jack Ma's Alibaba's Singles Day, people spent \$17.7 billion in a single day. Slightly more than Macys total sales in 2015, which totalled \$17.263 billion

Jack Ma wants to make Singles Day not just a China event but a Global event.

E Com changes the face of Luxury retailing

Online jewelry market is experiencing tremendous growth in Asia where it saw a CAGR of 62.2% from 2011 to 2014.

Global luxury e-commerce sales, expected to double from 6.00% to 12% by 2020, with 18% luxury on line sales by 2025. Source McKinsey & Co

Luxury on Line Retail expected to reach \$ 41.8 billion by 2019 - 14.8% annual growth so far since 2014

When shopping online, the luxury consumer prefers to shop in a multi-brand environment

The vendors are trying to capitalize on the inclination of shoppers to socialize on social media while they exchange product-related information.

Apparel and accessories are the biggest contributors to luxury ecommerce growth, with strong demand from newly affluent consumers in emerging markets such as China and Brazil.

List companies : Zalando, Yoox Net a Porter

Online Fashion Market

“We invest in Stockmarket Quoted Fashion companies but also we look at potential Fashion IPO’s and two recent addition IPO’s were Moncler and Brunello Cucinelli”



Today's Ecommerce Holding

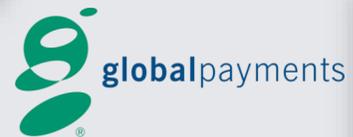
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YOOX
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YAHOO!



Alphabet



priceline.com

amazon



WPP Group plc



Wolters Kluwer

nielsen

JUST EAT



zalando



amadeus
Your technology partner



Tencent 腾讯



Ecommerce Summary

Not a Technology Fund

The fastest moving Global Trend

Global companies global growth

Easy to identify with

Touches everyone

Inevitable

THIS IS
a big investment opportunity.

REALLY BIG