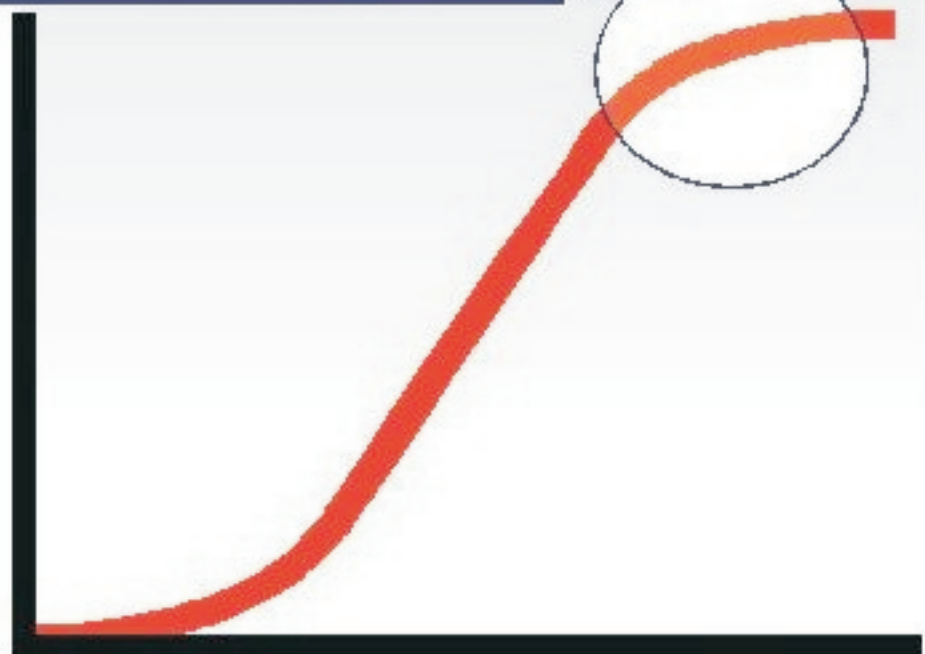


Advances: Value Driving Managers

Astonishing Value-Adding Possibilities

**But NOT
Here**



DIFFUSION/ACCEPTANCE S-CURVE

As new technologies and business models come to be adopted, HUGE returns can be obtained at the right moment on the curve

Not late in the adoption curve however; most of the value premium has already been reaped