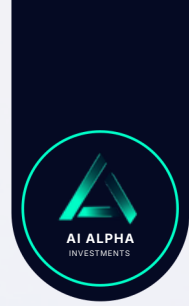




The Future of Intelligent Investing

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# AI-Driven Wealth



# AI Alpha

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*Powered by Conscious Capital Wealth Management, LLC*

## **Navigating the Future of Investing**

Artificial Intelligence (AI) is no longer a distant vision — it's a driving force behind today's most disruptive innovations. From automating industries to revolutionizing decision-making, AI is reshaping global markets at an accelerating pace, creating both unprecedented opportunities and new imperatives for investors.

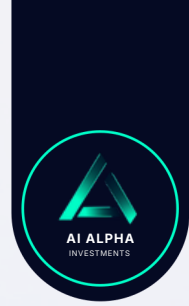
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Artificial intelligence is already reshaping markets, productivity, and competitive advantage—and we believe it will define the next major investment cycle. The challenge for investors is no longer whether AI matters, but how to gain exposure intelligently.

AI Alpha is designed to address that challenge by investing across the full AI value chain—focusing on where infrastructure, innovation, and real-world adoption translate into durable economic results. Rather than organizing the portfolio around traditional sectors or individual technologies, the strategy is structured around how value is actually created and captured in an AI-driven economy.

This systems-based approach allows AI Alpha to participate in the engines that benefit as intelligence becomes embedded across every layer of business—without relying on any single trend, product, or prediction.

For investors, the question is no longer if AI will shape the future, but how to position capital for maximum impact in this rapidly evolving landscape.



# AI Alpha Framework

## PCBO

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### Four Engines of AI-Driven Value Creation (PCBO)

AI Alpha™ is organized around four engines of AI-driven value creation—reflecting how artificial intelligence moves from physical infrastructure, through innovation, and ultimately into operating results.

Artificial intelligence is no longer simply a productivity tool or a technology theme. It is a force reshaping how value is created across the economy—from the physical infrastructure that powers intelligence, to the systems that make it usable, to the companies that convert it into measurable economic advantage. AI Alpha invests across four distinct engines of AI-driven value creation—Power, Compute, Builders, and Operators (PCBO)—seeking companies structurally positioned to benefit as intelligence becomes embedded across every layer of business.

#### **P | Power**

Energy generation, grid infrastructure, cooling, and physical systems required to run AI at scale.

#### **C | Compute**

Semiconductors, cloud platforms, networking, and the digital infrastructure powering AI workloads.

#### **B | Builders**

Software, systems, platforms, and innovators that translate raw AI capability into usable enterprise intelligence.

#### **O | Operators**

Companies using AI to drive efficiency, expand margins, and create durable competitive advantage.



# Why AI Alpha

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Harnessing the Power of AI to Build the  
Future of Investing

Investing in artificial intelligence is no longer about identifying a single technology or sector—it is about understanding how intelligence reshapes cost structures, decision-making, and competitive advantage. AI Alpha is designed to allocate capital to the infrastructure, builders, and operators best positioned to convert AI adoption into measurable economic outcomes.



## **Data-Driven Intelligence**

AI Alpha integrates real-time analytics and predictive modeling to uncover opportunities and adapt to market trends faster than traditional models.



## **Expert-Led, AI-Powered**

Our portfolio is managed by top industry experts and enhanced by AI-driven insights, combining human experience with cutting-edge technology.



## **Future-Focused Strategy**

AI Alpha targets companies that are not just participating in AI innovation, but leading it, ensuring exposure to high-growth opportunities across multiple AI segments.



## **Risk-Optimized Allocation**

A carefully structured investment approach balances established leaders with emerging disruptors, managing risk while maximizing growth potential.



# Investment Considerations

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## Balancing Innovation, Impact and Long-Term Growth Opportunities

The AI Alpha portfolio is built to harness the transformative power of AI while maintaining a disciplined approach to risk and opportunity. By strategically diversifying across key segments, we align investments with the most visionary, high-impact innovations shaping the future.

### Navigating Market Shifts

AI is evolving rapidly, and so are the markets. AI Alpha is designed to adapt and thrive, balancing established leaders with emerging disruptors poised for exponential growth. This approach reduces volatility while ensuring exposure to the next wave of breakthroughs.

### A Strategic Allocation for Every Investor

As AI continues to drive global shifts, every investor should consider an allocation to this sector as part of a diversified portfolio. AI Alpha provides a structured approach to capturing these opportunities while managing risk. With technology advancing at an exponential pace, positioning capital in this space is not just about participating in innovation — it's about staying relevant in the future of investing.

### Fueling the Future

Every investment in AI Alpha supports companies redefining industries and solving critical challenges — from healthcare and sustainable energy to automation and future intelligence. This is more than an investment strategy; it's a commitment to accelerating innovation that moves humanity forward.

### Staying Ahead in a Rapidly Evolving Sector

AI isn't just changing the world—it's reshaping the investment landscape. The AI Alpha portfolio is built to keep investors ahead of the curve, continuously evolving with the sector's fast-moving opportunities. With a forward-thinking strategy, we ensure capital flows toward the pioneers shaping tomorrow.



# Portfolio Leadership Behind AI Alpha

## Portfolio Leadership in the Age of Artificial Intelligence

Lawrence Ford is a recognized thought leader on the economic, technological, and human implications of artificial intelligence, with over 30 years of experience in investment strategy, portfolio management, and capital allocation, and responsibility for hundreds of millions of dollars in assets under management throughout his career.

He is the author of *The World Does(n't) Need You* — a rapidly emerging work on the future of work, artificial intelligence, and human relevance in the Age of AI — and *The Secrets of the Seasons*. His writing and speaking focus on how AI reshapes markets, organizations, leadership, and the very definition of value creation. Lawrence is increasingly sought after as a speaker and advisor on AI's impact on capital markets, global employment, and competitive advantage.

Lawrence's work sits at the intersection of capital, artificial intelligence, and human decision-making. He is also the Founder and Chairman of Conscious Capital Companies, the Conscious Capital Foundation, and Scious—an applied intelligence platform focused on understanding how artificial intelligence intersects with human decision-making, purpose, and systems-level outcomes. He is a Senior Fellow of the World Academy of Art and Science.

## Perspective

*Lawrence's research and perspective are informed by ongoing conversations with leading thinkers across artificial intelligence, economics, and systems design, providing early insight into how technological shifts translate into real-world market outcomes. AI Alpha™ represents the convergence of that experience into a focused, forward-looking investment strategy designed to navigate—and capitalize on—the transition into the Age of AI.*



**LAWRENCE FORD**  
Lead Portfolio Manager

As Founder and Chief Investment Officer, Lawrence serves as Lead Portfolio Manager for AI Alpha™, with direct responsibility for:

- Investment vision and strategy
- Portfolio construction and risk oversight
- Final security selection and allocation decisions
- Continuous evaluation of AI adoption, leadership quality, and structural advantage

### A Human-Led, AI-Enabled Investment Model

AI Alpha™ reflects a modern investment approach designed for an era of accelerating intelligence. Artificial intelligence is used as a core analytical partner within the investment process to:

- Analyze vast and complex data sets at scale
- Identify structural shifts driven by AI adoption
- Stress-test assumptions, scenarios, and portfolio exposures
- Enhance insight into margin dynamics, efficiency gains, and competitive positioning

AI informs decisions. Human judgment, accountability, and fiduciary responsibility direct them.

### A Human-Led, AI-Enabled Investment Model

AI Alpha™ is supported by an institutional trading, operations, and compliance infrastructure designed to ensure disciplined execution, transparency, and operational integrity.

This structure ensures that insight is translated into portfolios with precision, consistency, and accountability.



# Portfolio Attributes

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1

## **Diversification Across AI Value Creation Engines (PCBO):**

The allocation strategy spans foundational infrastructure to speculative innovations, reducing risk while maximizing exposure to growth opportunities.

2

## **Emphasis on Market Leaders:**

Each holding is selected based on leadership within its segment, ensuring representation from companies with proven track records and significant market influence.

3

## **Focus on Risk Management:**

With defined guidelines, including stop-loss triggers and performance monitoring, the portfolio balances growth with strategic safeguards.

4

## **Dynamic Rebalancing:**

The AI sector evolves rapidly. Regular reviews ensure the portfolio remains aligned with emerging trends and technology developments, adapting to market conditions.

# Invest Smarter





Ready to take the next steps?


## A Smarter Way to Invest in AI

With AI Alpha, you're not just investing in a portfolio—you're investing in the future. Position your capital where innovation thrives and let AI work for you.

### Contact Us:

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Management Fee: 90 bps  
Performance Fee: NA

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