

Konzerne wollen \$500 Milliarden in KI-Projekte stecken

US-Präsident Donald Trump hat ein massives Investitionsprogramm zur Förderung der KI-Infrastruktur in den USA angekündigt und gleichzeitig kippte er die Leitplanken für die Entwicklung von KI. Im Fokus steht nun das "Stargate Project", ein gemeinsames Vorhaben von OpenAI, SoftBank und Oracle, das in Texas angesiedelt ist. Zunächst sollen 100 Milliarden Dollar investiert werden, mit einer geplanten Aufstockung auf 500 Milliarden Dollar in den nächsten vier Jahren. Ziel ist es, die globale Führungsrolle der USA im Bereich Künstlicher Intelligenz zu sichern, 100.000 Arbeitsplätze zu schaffen und die Wirtschaft weltweit zu stärken. Trump versprach, das Projekt durch Notfallerrasse zu unterstützen, insbesondere in Bezug auf die Energieversorgung.

Zu den technologischen Partnern gehören Arm (US0420682058), Microsoft (US5949181045) und Nvidia (US67066G1040). SoftBank-Chef Masayoshi Son wird das Gemeinschaftsunternehmen leiten, während OpenAI die operative Verantwortung übernimmt. Die Ankündigung führte zu einem Kursanstieg der Oracle-Aktie (US68389X1054).

Das Projekt reflektiert den sprunghaften Anstieg von KI-Investitionen seit 2022, ausgelöst durch die Einführung von ChatGPT. Gleichzeitig warnt das Electric Power Research Institute, dass Rechenzentren bis Ende des Jahrzehnts bis zu neun Prozent der US-Stromproduktion beanspruchen könnten. Der ehemalige Präsident Joe Biden unterzeichnete Mitte Januar als eine seiner letzten Amtshandlungen einen Erlass, um die Stromversorgung von KI-Rechenzentren zu sichern.

BUY

Taiwan Semiconductor Manufacturing (ISIN: US8740391003)

Unser KI-Experte bewertet die Taiwan Semiconductor Manufacturing Company (TSMC) als eine außergewöhnlich starke Investition, basierend auf einer Analyse der jüngsten Quartalsergebnisse und langfristigen Aussichten. TSMC hat erneut hervorragende Zahlen vorgelegt, darunter eine 3,6% Umsatzsteigerung über den Erwartungen und eine beeindruckende 19,6% jährliche Wachstumsrate der letzten drei Jahre. Besonders positiv bewertet der Experte die starke Marktposition des Unternehmens, die durch seine technologische Führerschaft und globale Skaleneffizienz gestützt wird.

Die Margen bleiben trotz temporärer Belastungen durch globale Expansion und Technologie-Upgrades robust. TSMCs Fähigkeit, hochentwickelte Chips mit fortschrittlichen Technologien wie 3nm und 5nm effizient zu fertigen, stärkt seine Position als unverzichtbarer Partner für Branchenführer wie Nvidia und AMD. Die langfristigen Wachstumsperspektiven, insbesondere im Bereich KI-Hardware, sind enorm, da TSMCs Lösungen entscheidend für Anwendungen wie generative KI und High-Performance-Computing (HPC) sind. Mit einer prognostizierten jährlichen Wachstumsrate von 20% über fünf Jahre unterstreicht das Unternehmen seine strategische Relevanz.

Obwohl kurzfristige Kosten durch globale Expansion und politische Risiken auftreten, bewertet der KI-Experte diese Herausforderungen als überwindbar. Mit einem „echten“ wirtschaftlichen Burggraben, einem außergewöhnlichen Management und einem starken Innovationsfokus bleibt TSMC ein führender Akteur im Technologiemarkt mit langfristigem Potenzial.

BUY

Netflix Inc. (ISIN: US64110L1061)

Unser KI-Experte ist äußerst positiv gegenüber der Netflix-Aktie eingestellt und lobt die Leistung des Unternehmens in diesem Quartal. Die beeindruckende Abbonnentenzunahme und das Umsatzwachstum trotz erheblicher Währungsbelastungen zeigen die Stärke des Geschäftsmodells. Besonders bemerkenswert ist, dass Netflix seinen EBIT-Margen-Ausblick auf 29 % angehoben hat, was die Fähigkeit unterstreicht, Profitabilität auch unter schwierigen Bedingungen zu steigern.

Die langfristigen Wachstumsperspektiven werden als vielversprechend eingeschätzt, insbesondere in neuen Bereichen wie Live-Programmierung, Kinderinhalten und Gaming. Diese ergänzen die Kernaktivitäten und könnten die ohnehin schon exzellenten Kundenbindungsraten weiter verbessern. Der Experte hebt hervor, dass Netflix sich erfolgreich weiterentwickelt, indem es Werbe-basierte Abonnements skaliert und innovative Produkte wie eine eigene Werbepattform einführt.

Obwohl es kleinere Herausforderungen bei der kurzfristigen Quartalsprognose gab, werden diese durch Sonderfaktoren wie Steuern und saisonale Schwankungen erklärt. Der Experte sieht keine fundamentalen Risiken, sondern vielmehr ein enormes Potenzial für zukünftiges Wachstum. Die starke Führung und die langjährige Erfolgsbilanz des Unternehmens untermauern dieses positive Urteil.

Auch wenn die Aktie nicht „besonders günstig“ ist, reflektiert dies die Qualität und das Potenzial des Unternehmens. Anleger können beruhigt sein, da Netflix eine starke Position für langfristiges Wachstum besitzt.



23.01.2025

Rank	Name	ISIN	Trend Score	Gross Margin	EV/Sales	Rule of 40	Overall
1 ▲ 2	Credo Technology Group Holding Ltd	KYG254571055	99.80%	*	-		4
2 ▼ 1	Applovin Corp	US03831W1080	99.76%	**		***	8
3 ▲ 5	Robinhood Markets Inc	US7707001027	98.92%	***	-	***	9
4 ▼ 3	YPF Sociedad Anonima	US9842451000	98.68%		***	***	9
5 ▲ 6	Ubiquiti Networks Inc	US90353W1036	98.52%			*	4
6 ▼ 4	Palantir Technologies Inc. Class A Common Stock	US69608A1088	98.28%	***	-	***	9
7 ■ 7	International Consolidated Airlines Group S.A	ES0177542018	98.12%		***		6
8 ▲ 9	Roblox Corp	US7710491033	96.80%			**	5
9 ▼ 8	Broadcom Inc	US11135F1012	95.96%	*		***	7
10 ▲ 16	LPL Financial Holdings Inc	US50212V1008	94.60%		***	***	9
11 ▲ 23	Vertiv Holdings Co	US92537N1081	94.56%		***		6
12 ▼ 11	DocuSign Inc	US2561631068	94.48%	***	***		9
13 ▲ 21	Wix.Com Ltd	USM980681052	94.28%	**	*	*	7
14 ▲ 33	Texas Pacific Land Trust	US88262P1021	93.92%	***	-	***	9
15 ▲ 18	Cloudflare Inc	US18915M1071	93.56%	***		*	7
16 ▼ 14	Axon Enterprise Inc.	US05464C1018	93.52%	*		*	5
17 ▲ 19	Interactive Brokers Group Inc	US45841N1072	92.96%	***	***	***	12
18 ▼ 10	Shopify Inc	CA82509L1076	92.92%				3
19 ▼ 12	Lululemon Athletica Inc.	US5500211090	92.88%	*	-		4
20 ▲ 42	Rheinmetall AG	DE0007030009	92.76%		***		6

Rank	Name	ISIN	TS	GM	EV/S	R40	O
21 ▼ 15	Natera Inc	US6323071042	91.88%	*		***	7
22 ▲ 26	Snowflake Inc.	US8334451098	91.56%	**	-	***	8
23 ▼ 17	Doximity Inc	US26622P1075	91.48%	***	-	***	9
24 ▼ 22	Atlassian Corp Plc	US0494681010	91.04%	***		***	9
25 ▼ 24	Deckers Outdoor Corporation	US243571073	89.44%	*			3
26 ▲ 38	BE Semiconductor Industries NV	NL0012866412	89.16%	**			4
27 ▼ 13	Affirm Holdings Inc	US0827B1061	89.16%	***	**	***	10
28 ▼ 25	HubSpot Inc	US4435731009	88.68%	***		*	6
29 ■ 29	Arista Networks	US0404131064	88.40%	*		***	6
30 ▼ 27	Duolingo Inc	US26603R1068	87.60%	**	-	***	7
31 ▼ 20	Shopify Inc	US82509L1070	87.56%			*	3
32 ▲ 50	Comfort Systems USA Inc	US1999081045	87.28%		***	*	6
33 ▲ 46	SAP SE	DE0007164600	86.40%	**	**		6
34 ▲ 40	Sea Ltd	US81141R1005	86.40%		***		5
35 ▼ 30	Synchrony Financial	US87165B1035	86.32%	***	***	***	11
36 ▲ 39	Discover Financial Services	US2547091080	86.16%	***	***	***	11
37 ▼ 28	Carnival Corporation	US1436583009	86.00%		***		5
38 ▼ 35	Carnival Plc ADS	US14365C1036	84.68%		***		5
39 ▼ 37	First Horizon National Corporat...	US3205171057	84.64%	***	***	***	11
40 ▼ 31	Toast Inc	US8887871080	84.56%		-		2

Rank	Name	ISIN	TS	GM	EV/S	R40	O
41 ■ 41	CyberArk Software Ltd	USM2682V1081	83.96%	***		*	6
42 ▲ 45	Raymond James Financial Inc.	US7547301090	83.88%	***	***		8
43 ▲ 44	F5 Networks Inc	US3156161024	81.28%	***	***		8
44 ▲ 60	Coinbase Global Inc	US19260Q1076	81.28%	***		***	8
45 ▼ 36	DoorDash, Inc. Class A Comm...	US25809K1051	80.80%		-	*	3
46 ▼ 34	Fortinet Inc	US34959E1091	80.48%	***			5
47 ▲ 62	Svenska Handelsbanken AB (p...	SE0007100607	80.08%	***		***	8
48 ▲ 52	Williams Companies Inc	US9694571004	79.96%	*	**		4
49 ▲ 57	Wells Fargo & Company	US9497461015	79.92%	***	***		7
50 ▲ 75	Globus Medical	US3795772082	79.68%			***	4
51 ▼ 32	Expedia Group Inc.	US30212P3038	79.44%		***		4
52 ▼ 43	Apollo Global Management LL...	US03769M1062	79.24%	***	***	***	10
53 ▲ 80	Howmet Aerospace Inc	US4432011082	79.00%		***		4
54 ▲ 56	CrowdStrike Holdings Inc	US22788C1053	78.12%	***		***	7
55 ▲ 59	Capital One Financial Corporat...	US14040H1059	78.08%	***	***	***	10
56 ▲ 68	TechnipFMC PLC	GB00BDSFG982	77.96%		***		4
57 ▲ 77	Pure Storage Inc	US74624M1027	77.96%	**	***		6
58 ▼ 53	Insulet Corporation	US45784P1012	77.88%	***	*		5
59 ▼ 47	Godaddy Inc	US3802371076	77.84%	*	***		5
60 ▲ 65	Bank of Montreal	CA0636711016	76.36%	***	***	***	10

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The category "Large Caps, Growth" consists of all companies with a market capitalization of more than USD 10 billion at the cut-off date and which meet a predefined minimum level in the growth score.

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Rank	Name	ISIN	Trend Score	PE Ratio	Div Yield	Debt Ratio	Overall
1	United Airlines Holdings Inc	US9100471096	100.00%	***	***	**	11
2	International Consolidated Airlines Group S.A	ES0177542018	99.60%	***		***	9
3	American Airlines Group	US02376R1023	99.28%	**	***		8
4	EQT Corporation	US26884L1098	98.76%				3
5	Jabil Circuit Inc	US4663131039	98.36%			***	6
6	Standard Chartered PLC	GB0004082847	97.32%	***		***	9
7	Delta Air Lines Inc	US2473617023	97.24%	***		***	9
8	Heidelberg Materials AG	DE0006047004	96.48%			**	5
9	MasTec Inc	US5763231090	96.44%			**	5
10	Toray Industries Inc.	JP3621000003	95.84%			*	4
11	Flex Ltd	USY2573F1022	95.20%	*	*	***	8
12	Synchrony Financial	US87165B1035	94.96%	***		***	9
13	Erste Group Bank AG	AT0000652011	94.52%	***		-	6
14	First Horizon National Corporation	US3205171057	94.12%	**		***	8
15	Entergy Corporation	US29364G1031	94.04%	**	**		7
16	HOCHTIEF Aktiengesellschaft	DE0006070006	93.28%	**	*	***	9
17	Energy Transfer LP	US29273V1008	93.08%	*	***		7
18	Societe Generale S.A.	FR0000130809	92.56%	***	**		8
19	HSBC Holdings PLC	GB0005405286	91.96%	***	-		6
20	Unum Group	US91529Y1064	91.40%	***		***	9

Rank	Name	ISIN	TS	P/E	DY	DR	O
21	Sompo Holdings Inc	JP3165000005	91.24%	***	*	***	10
22	NRG Energy Inc.	US6293775085	90.88%	***		**	8
23	Citigroup Inc	US1729674242	90.72%	**	*	***	9
24	Wells Fargo & Company	US9497461015	90.36%	**	*	***	9
25	Panasonic Corp	JP3866800000	90.12%	***	*	***	10
26	Telefonaktiebolaget LM Ericss...	SE0000108656	89.72%		*	***	6
27	Deutsche Bank Aktiengesellsc...	DE0005140008	89.52%	***		***	8
28	Capital One Financial Corporat...	US14040H1059	89.28%	**		***	7
29	Svenska Handelsbanken AB (p...	SE0007100607	89.20%	***	***	***	11
30	NTT Data Corp.	JP3165700000	88.16%			***	5
31	Fox Corp Class B	US35137L2043	87.80%	***		***	8
32	Coterra Energy Inc	US1270971039	87.08%	*		***	6
33	Pearson PLC	GB0006776081	86.84%	***		-	5
34	Swiss Re AG	CH0126881561	86.48%	**	**	***	9
35	Fresenius Medical Care AG &...	DE0005785802	86.44%	**	*	*	6
36	Commerzbank AG	DE000CBK1001	86.28%	***		***	8
37	Taiwan Semiconductor Manufa...	US8740391003	85.92%		***	***	8
38	Bank of Montreal	CA0636711016	85.68%	**	*		5
39	Imperial Brands PLC	GB0004544929	85.24%	***	***	-	8
40	Hewlett Packard Enterprise Co	US42824C1099	84.44%	**		***	7

Rank	Name	ISIN	TS	P/E	DY	DR	O
41	Jefferies Financial Group Inc	US47233W1099	84.28%			**	4
42	Julius Baer Gruppe AG	CH0102484968	83.80%	**	**		6
43	Banco de Sabadell S.A	ES0113860A34	83.68%	***	*		6
44	Assicurazioni Generali S.p.A.	IT0000062072	83.44%	**	*	***	8
45	Fox Corp Class A	US35137L1052	83.00%	**		***	7
46	Renault SA	FR0000131906	81.80%	**			4
47	ACS Actividades de Construcci...	ES0167050915	81.64%		*		3
48	Stifel Financial Corporation	US8606301021	81.16%	*	*	***	7
49	Brookfield Corporation	CA11271J1075	80.88%	*			3
50	UBS Group AG	CH0244767585	80.84%		*		3
51	Nutrien Ltd	CA67077M1086	80.60%	**	*	**	7
52	Nokia Oyj	FI0009000681	80.40%	**		***	7
53	Goldman Sachs Group Inc	US38141G1040	80.36%	**	*		5
54	Ford Motor Company	US3453708600	80.24%	***	***		8
55	Fairfax Financial Holdings Ltd	CA3039011026	80.20%	***		***	8
56	Warner Bros Discovery Inc	US9344231041	79.68%	***		***	7
57	Intesa SanPaolo SPA	IT0000072618	79.68%	***	**	***	9
58	Cardinal Health Inc	US14149Y1082	78.72%	*		***	5
59	Svenska Handelsbanken AB (p...	SE0007100599	77.84%	***	***	***	10
60	Banco Bilbao Vizcaya Argentar...	ES0113211835	76.96%	***	***	***	10

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Rank	Name	ISIN	Trend Score	Gross Margin	EV/Sales	Rule of 40	Overall
1	Palladyne AI Corp	US80359A2050	100.00%		-		3
2	Vuzix Corp Cmn Stk	US92921W3007	99.52%				3
3	Robinhood Markets Inc	US7707001027	98.72%	***	-	***	9
4	Palantir Technologies Inc. Class A Common Stock	US69608A1088	97.80%	***	-	***	9
5	SoFi Technologies Inc.	US83406F1021	97.24%	***	***		9
6	Tesla Inc	US88160R1014	97.00%				3
7	Xometry Inc	US98423F1093	96.80%		***		6
8	Twilio Inc	US90138F1021	96.52%		***		6
9	Peloton Interactive Inc	US70614W1009	96.32%		***		6
10	Elbit Systems Ltd	IL0010811243	95.16%		-		3
11	FARO Technologies Inc	US3116421021	95.12%		***		6
12	Adaptive Biotechnologies Corp	US00650F1093	94.48%		-		3
13	Guardant Health Inc	US40131M1099	94.32%	***	***		9
14	Bill Com Holdings Inc	US0900431000	94.32%	***	**	*	9
15	Kratos Defense & Security Solutions	US50077B2079	93.76%		***		6
16	Accolade Inc	US00437E1029	93.68%		***		6
17	POET Technologies Inc	CA73044W3021	93.32%		-		3
18	DocuSign Inc	US2561631068	92.96%	***	***		9
19	Codexis Inc	US1920051067	92.68%	**	**		7
20	Wix.Com Ltd	USM980681052	92.56%	**	*	*	7

Rank	Name	ISIN	TS	GM	EV/S	R40	O
21	Shopify Inc	CA82509L1076	92.24%				3
22	Cloudflare Inc	US18915M1071	92.16%	***		*	7
23	Hims Hers Health Inc	US4330001060	91.20%	***	-	***	9
24	Carpenter Technology Corpora...	US1442851036	90.68%		***		6
25	Materialise NV	US57667T1007	90.68%	*	***		7
26	Snowflake Inc.	US8334451098	90.56%	**	-	***	8
27	Toray Industries Inc.	JP3621000003	90.44%		***		6
28	Lemonade Inc	US52567D1072	89.96%	***	***		8
29	Veracyte Inc	US92337F1075	89.56%	**			4
30	LendingClub Corp	US52603A2087	89.04%	*	***		6
31	Spotify Technology SA	LU1778762911	88.96%		***		5
32	LivePerson Inc	US5381461012	88.36%	*	***		6
33	Sea Ltd	US81141R1005	87.96%		***		5
34	5N Plus Inc.	CA33833X1015	87.48%		***		5
35	Toast Inc	US8887871080	87.36%		-		2
36	Coinbase Global Inc	US19260Q1076	85.92%	***		***	8
37	Trimble Inc	US8962391004	85.00%	*	***		6
38	Crowdstrike Holdings Inc	US22788C1053	84.84%	***		***	8
39	Pure Storage Inc	US74624M1027	84.68%	**	***		7
40	Airbus Group SE	NL0000235190	84.52%		***		5

Rank	Name	ISIN	TS	GM	EV/S	R40	O
41	Zillow Group Inc Class C	US98954M2008	83.84%	***	***		8
42	Block Inc	US8522341036	83.60%		***		5
43	Taiwan Semiconductor Manufa...	US8740391003	82.72%		***	***	8
44	Amazon.com Inc	US0231351067	82.64%		***		5
45	PayPal Holdings Inc	US70450Y1038	82.44%		***		5
46	Siemens Aktiengesellschaft	DE0007236101	82.40%		***		5
47	Garmin Ltd	CH0114405324	82.40%	*			3
48	Personalis Inc	US71535D1063	82.36%		***		5
49	Nintendo Co Ltd	JP3756600007	82.00%	*	-	***	6
50	Netflix Inc	US64110L1061	81.80%		*		3
51	Adyen NV	NL0012969182	81.44%	**	-		4
52	Alphabet Inc Class A	US02079K3059	81.08%	*	***		6
53	Altair Engineering Inc	US0213691035	80.88%	***			5
54	Proto Labs Inc	US7437131094	80.44%		***		5
55	Intuitive Surgical Inc	US46120E6023	80.24%	**			4
56	Koninklijke Ahold Delhaize NV	NL0011794037	77.60%		***		4
57	Zoom Video Communications Inc	US98980L1017	77.52%	**	-	*	4
58	Meta Platforms Inc.	US30303M1027	77.40%	***	**	***	9
59	Nikon Holdings Co Ltd	JP3709600005	77.08%		***	***	7
60	Cameco Corp	CA13321L1085	76.76%				1

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Rank	Name	ISIN	Trend Score	Gross Margin	EV/Sales	Rule of 40	Overall
1 ▲ 2	Cerence Inc	US1567271093	99.84%	**	***		8
2 ▼ 1	Palladyne AI Corp	US80359A2050	99.76%		-		3
3 ■ 3	SoundHound AI Inc	US8361001071	99.00%	*			4
4 ■ 4	Butterfly Network Inc	US1241551027	99.00%		-		3
5 ■ 5	Appen Ltd	AU000000APX3	98.04%	-	***	-	6
6 ■ 6	Palantir Technologies Inc. Class A Common Stock	US69608A1088	98.00%	***	-	***	9
7 ■ 7	Innodata Inc	US4576422053	97.44%			***	6
8 ■ 8	Tesla Inc	US88160R1014	97.40%				3
9 ■ 9	Marvell Technology Group Ltd	US5738741041	97.12%				3
10 ▲ 13	Ciena Corp	US1717793095	95.72%		***		6
11 ■ 11	Broadcom Inc	US11135F1012	95.60%	*		***	7
12 ▲ 16	Wix.Com Ltd	USM980681052	95.00%	**	*	*	7
13 ▼ 10	POET Technologies Inc	CA73044W3021	94.92%		-		3
14 ▲ 17	Vertiv Holdings Co	US92537N1081	94.92%		***		6
15 ▼ 12	Shopify Inc	CA82509L1076	94.64%				3
16 ▼ 15	Upwork Inc	US91688F1049	94.28%	***	***		9
17 ▲ 21	Snowflake Inc.	US8334451098	93.44%	**	-	***	8
18 ▼ 14	Lemonade Inc	US52567D1072	92.84%	***	***		9
19 ▼ 18	Upstart Holdings Inc	US91680M1071	92.44%	***	*		7
20 ▲ 22	Spotify Technology SA	LU1778762911	92.32%		***		6

Rank	Name	ISIN	TS	GM	EV/S	R40	O
21 ▼ 19	HubSpot Inc	US4435731009	92.28%	***		*	7
22 ▼ 20	Duolingo Inc	US26603R1068	92.08%	**	-	***	8
23 ■ 23	Arista Networks	US0404131064	92.04%	*		***	7
24 ▲ 34	Rambus Inc	US7509171069	90.56%	***		***	9
25 ▼ 24	Pearson PLC	GB0006776081	90.32%	-	***	-	6
26 ▲ 29	ExlService Holdings Inc	US3020811044	89.60%		***		5
27 ■ 27	Dropbox Inc	US26210C1045	89.28%	***	***		8
28 ■ 28	CrowdStrike Holdings Inc	US22788C1053	89.28%	***		***	8
29 ▼ 26	Godaddy Inc	US3802371076	89.20%	*	***		6
30 ▲ 33	Pure Storage Inc	US74624M1027	89.12%	**	***		7
31 ▲ 32	Taiwan Semiconductor Manufa...	US8740391003	87.92%		***	***	8
32 ▼ 30	Amazon.com Inc	US0231351067	87.68%		***		5
33 ▼ 25	C3 Ai Inc	US12468P1049	87.24%	*	-		3
34 ▲ 41	Gitlab Inc	US37637K1088	86.72%	***	-		5
35 ▲ 37	Alphabet Inc Class A	US02079K3059	86.40%	*	***		6
36 ▼ 35	Altair Engineering Inc	US0213691035	86.20%	***			5
37 ▲ 38	Cisco Systems Inc	US17275R1023	86.00%	*	***		6
38 ▲ 45	Relx PLC	GB00B2B0DG97	85.88%	-	**	-	4
39 ▲ 40	Genpact Limited	BMG3922B1072	85.60%		***		5
40 ▼ 31	Confluent Inc	US20717M1036	85.48%	**	**		6

Rank	Name	ISIN	TS	GM	EV/S	R40	O
41 ▼ 36	Salesforce.com Inc	US79466L3024	84.72%	***	**	*	8
42 ■ 42	Meta Platforms Inc.	US30303M1027	84.04%	***	**	***	10
43 ▼ 39	Datadog Inc	US23804L1035	83.28%	***		***	8
44 ■ 44	Lattice Semiconductor Corpora...	US5184151042	83.24%	*	*		4
45 ▼ 43	NVIDIA Corporation	US67066G1040	82.36%	***		***	8
46 ▲ 48	Nutanix Inc	US67059N1081	82.00%	***	**	*	8
47 ■ 47	Amphenol Corporation	US0320951017	81.96%		***		5
48 ▼ 46	International Business Machines	US4592001014	81.20%	*	***		6
49 ■ 49	Somalogic Inc	US83444K1051	80.56%	-	-	-	2
50 ■ 50	Elastic NV	NL0013056914	80.52%	**	***		7
51 ■ 51	Uipath Inc	US90364P1057	80.40%	***	-		5
52 ▲ 55	Workday Inc	US98138H1014	78.72%	***	***	*	8
53 ▲ 66	Capgemini SE	FR0000125338	78.44%		***		4
54 ▼ 53	Infosys Ltd ADR	US4567881085	78.40%		***		4
55 ▲ 67	Micron Technology Inc	US5951121038	78.32%		***	***	7
56 ▲ 59	Microsoft Corporation	US5949181045	78.24%	**		**	5
57 ▼ 52	Dynatrace Holdings LLC	US2681501092	78.24%	***		**	6
58 ▲ 64	Fabrinet	KYG3323L1005	78.16%		***		4
59 ▼ 56	CCC Intelligent Solutions Holdi...	US12510Q1004	78.12%	**	**		5
60 ▼ 58	Oracle Corporation	US68389X1054	78.00%	**	**		5

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