



16 November 2020

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) 2020/2021 Conference Portfolio.

For and on behalf of the board,

A handwritten signature in blue ink, appearing to read 'T. Bloomfield'.

Tom Bloomfield  
Company Secretary

## HM1 2020/2021 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 and Minds Investment Leaders Conference was held on Friday 13 November 2020. HM1 will be investing in the stocks pitched at this year's conference. The stocks that will be acquired for the HM1 Conference Portfolio are:

Company	Ticker Code
Bill.com Holdings, Inc.	BILL
CSL Limited	CSL.AX
Dish Network Corporation	DISH
Fisher & Paykel Healthcare Corporation Ltd	FPH.AX
Hello Fresh SE	HFG.DE
Nintendo Co., Ltd.	7974.T
Ping An Healthcare and Technology Company Limited	1833.HK
Shenzhou International Group Holdings Limited	2313.HK
Slack Technologies, Inc.	WORK
T Mobile US, Inc.	TMUS
Target Corporation	TGT
Teladoc Health, Inc.	TDOC
Temple & Webster Group Ltd	TPW.AX
Treasury Wine Estates Limited	TWE.AX
Yeakha Limited	9923.HK

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