



20 November 2023

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) 2023/2024 Conference Portfolio.

For and on behalf of the board,

A handwritten signature in blue ink, appearing to read "T. Bloomfield", is positioned above the printed name.

Tom Bloomfield
Company Secretary

HM1 2023/2024 Conference Portfolio

Hearts and Minds Investments Limited (HM1) advises that, in line with its investment strategy, it will be refreshing its Conference Portfolio. The Conference Portfolio which represents 35% of HM1's total investment portfolio is made up of stocks presented at the annual Sohn Hearts & Minds Investment Leaders Conference. Stocks in the Conference Portfolio are generally held for a period of 12 months.

The latest Sohn Hearts and Minds Investment Leaders Conference was held on Friday 17 November 2023. HM1 will invest in the stocks presented at this year's conference as set out in the table below.

Company	Ticker Code
Ashland Inc	ASH.NYSE
AIA Group Limited	1299.HK
Bath & Body Works, Inc	BBWI.NYSE
Games Workshop Group PLC	GAW.L
Lamb Weston Holdings, Inc	LW.NYSE
Miniso Group Holdings Limited	9896.HK
Nexgen Energy Ltd	NXE.TO
Resmed Inc.	RMD.NYSE
Swire Pacific Limited	0019.HK
Telix Pharmaceuticals Limited	TLX.AX
UniCredit S.p.A	UCG.MI
Webster Financial Corporation	WBS.NYSE
Wise PLC	Wise.L

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