Successful innovation investing

Investable opportunities sparked by innovation extend far beyond technology and can be applied to an existing technology, to develop new business models, reach new customers or address new markets.

Roundtable panelists:
- Michael Masolo, Head of Technology, Science and Portfolio Manager, Wellington Management
- Donald Rice, Head of Fund Managers, Wellington Management
- Moderator: Gemma Cole, Wealth Editor, The Business Times

Innovation is a key driver of growth and profound transformation, a contextually nuanced understanding of the shifts in enabling technologies, science, industries and geographies is key to success in innovation investing.

Michael Masolo: Our definition of innovation is very broad. It can be a new technology, a new business model, new intellectual property, a new business, among numerous other factors. It can also cross across sectors, geography or age. For example, an established large-cap company might transform its business to a small to mid-cap from an incumbent.

In some cases, competitors control their own destiny by creating a new industry or expanding into another field. This is similar to playing field, a market, relatively easy to enter and exit.

We see companies across industries moving into adjacent spaces, creating new competitors, new risks and opportunities for investors. This means we are not wedded to the macro environment, to the type of sectors, but to long-term structural trends driving innovation.

Often, we see growth in one area that is diversified and focused on sustainable and growth opportunities regardless of industry. This drives us to deliver strong performance and value for our investors.

We ask ourselves: “How do innovative companies create value in today’s world? What will tomorrow look like?”

Unanswerable: Many more people mass innovation is coming up with new technology. Actually, innovation is often the result of applying an existing technology to develop a new product that was never before used in a new market or new markets. Sometimes, it can be a new technology with a new use in a new market or in a completely compelling proposition. For example, by combining existing technology in a new way, a company can create something new and create something new and create something new and create something new and create something new that can gain traction and spread.

In the world of innovation, we are seeing growth in one area that is diversified and focused on sustainable and growth opportunities regardless of industry. This drives us to deliver strong performance and value for our investors.

Michael Masolo: Innovation is often more about applying an existing technology to develop new business models, reach new customers or address new markets.

Sometimes, it is about creating a new technology with an old one to come up with a completely new proposition.

The notion of a “circular economy” is gaining increasing acceptance as tackling the world’s enormous waste production and its impact on our planet have now transformed into a structural growth story.

“Today, the world that is filled with opportunities is driven by both growth and profound transformation, a contextually nuanced understanding of the shifts in enabling technologies, science, industries and geographies is key to success in innovation investing.”

Michael Masolo

There is no one-size-fits-all but there’s a repeatable pattern to unlocking innovation.

Q: Investors often have concerns about extreme environment impacts on the innovation space. What’s your view on this and what advice would you give investors looking to invest?

Michael: We see extreme environment impacts as a significant factor in the innovation space. For example, extreme weather patterns are now becoming more frequent and severe. This is impacting businesses across multiple industries, from agriculture to transportation, and is driving innovation in ways we had never before imagined.

Q: What motivates you to do before innovation opportunities come to light, regardless of economic cycles?

Michael: The rise in technology is arguably the most significant megatrend and is driving innovation and growth, regardless of economic cycles.

When we talk about technology or innovation, we often think about the benefits and opportunities it brings. Technology and innovation are not just about creating new products or services. They are about changing the way we live, work, and interact with each other.

In a world that is increasingly connected, technology is driving innovation in ways we had never before imagined. This is driving innovation in ways we had never before imagined. This is driving innovation in ways we had never before imagined.

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