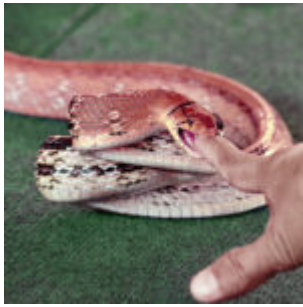


April War Room: De-FAANGeD



Even with oil, Russia-Ukraine and rates rising, the de-coupling of the tech sector is still one of the scariest themes of the last six months. What started as a crash in high-flying pandemic tech darlings, led to a 40% haircut in Facebook and Netflix. Tech is no longer moving in tandem, and all manner of PMs, PE, and investors can no longer juice performance with the five names at the top.

- Are tech multiples done contracting and which mega-caps are most vulnerable?
- What are PMs doing to reduce vulnerability of their models to the tech sector de-coupling?
- How should investors position tech allocations as the FAANGs era fades?

Join us as we drop a new scenario on tech sector movements and debut a new segment on asset manager thought leadership - with Jordan Stuart of Federated Hermes - in the next Orion War Room.