

# Research Unplugged: US Conviction List - Directors' Cut: July 2024 Spotlight

## US Conviction List - Directors' Cut

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In this podcast, we listen in as Will Nance, Kash Rangan, and Mike Ng join Sarah Herr to discuss three of the ideas – Global-E (GBLE), Snowflake (SNOW), and Fox Corporation (FOXA) – featured in the July 2024 edition of the [US Conviction List - Directors' Cut](#). In this edition, we add Global-E (GLBE), Snowflake (SNOW), and Fox Corporation (FOXA) to the Conviction List, while removing Monday.com (MNDY) and Quanterix (QTRX).

*The full list of topics and speakers is below, with approximate start times in parentheses.*

### Speakers:

- (0:17) **Global-E (GLBE)** – Will Nance, Payments & FinTech Research
- (14:25) **Snowflake (SNOW)** – Kash Rangan, Software
- (21:10) **Fox Corporation (FOXA)** – Michael Ng, Hardware, Media & SMID FinTech

### Moderator:

- Sarah Herr – US Research Merchandising

### Previous Podcasts:

- [Research Unplugged: US Conviction List - Directors' Cut: June 2024 Spotlight – One Year On](#)
- [Research Unplugged: US Conviction List - Directors' Cut: May Spotlight](#)

### Relevant Research:

- [US Conviction List-Directors' Cut: Sectors Focus: Spotlight on the Elections](#)
- [US Conviction List - Directors' Cut: June 2024 - One Year On](#)
- [US Conviction List - Directors' Cut: January 2024 Update: Top Themes for the](#)

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Year Ahead

- [US Conviction List - Directors' Cut: December 2023 Update: Six Month Check In](#)
- [US Conviction List - Directors' Cut](#)

Visit the US Conviction List portal page here: [US Conviction List — Directors' Cut](#)



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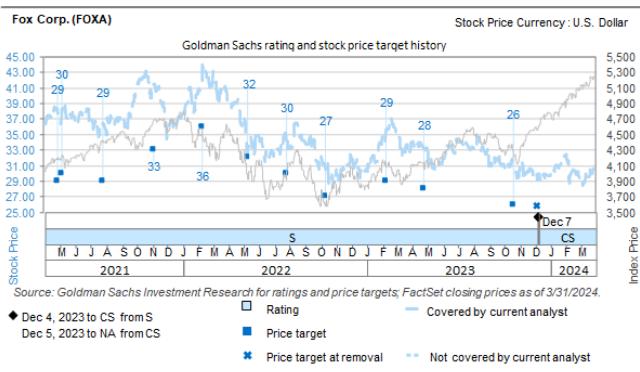
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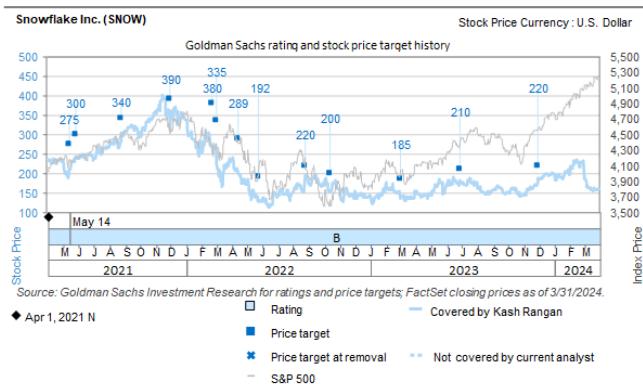
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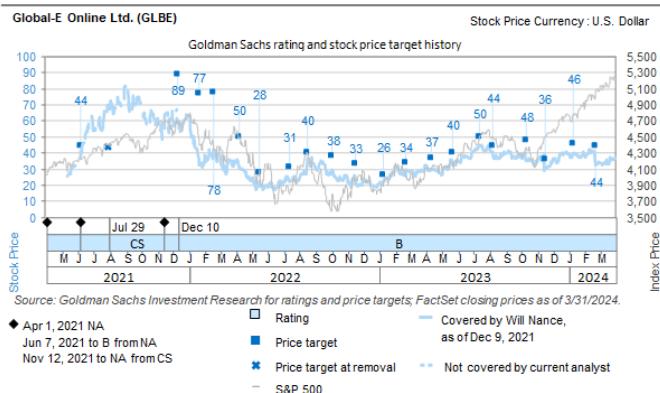
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