

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

US Conviction List - Directors' Cut

See the list >



Sarah Herr

+1(212)357-0094 | sarah.herr@gs.com
Goldman Sachs & Co. LLC

Chris Hussey

+1(212)902-7564 | chris.hussey@gs.com
Goldman Sachs & Co. LLC

Will Nance

+1(212)357-7438 | will.nance@gs.com
Goldman Sachs & Co. LLC

Kash Rangan

+1(415)249-7318 | kash.rangan@gs.com
Goldman Sachs & Co. LLC

Michael Ng, CFA

+1(212)902-8618 | michael.ng@gs.com
Goldman Sachs & Co. LLC

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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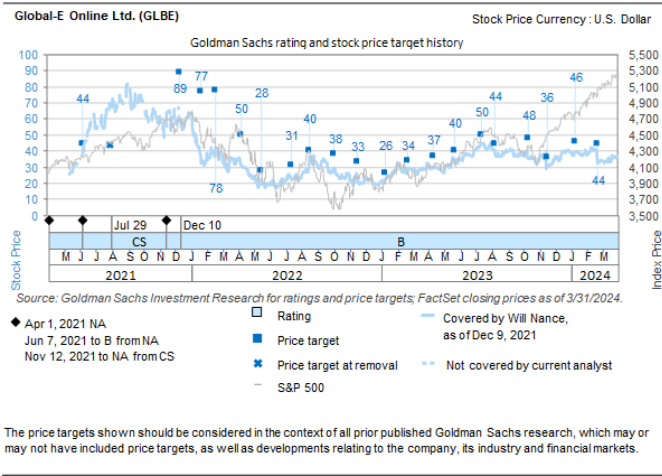
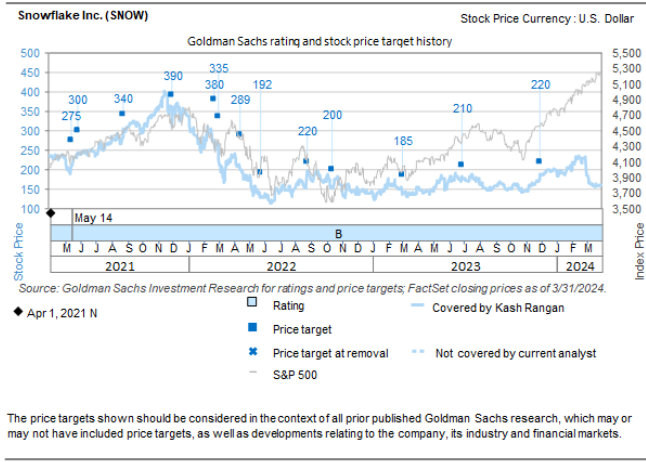
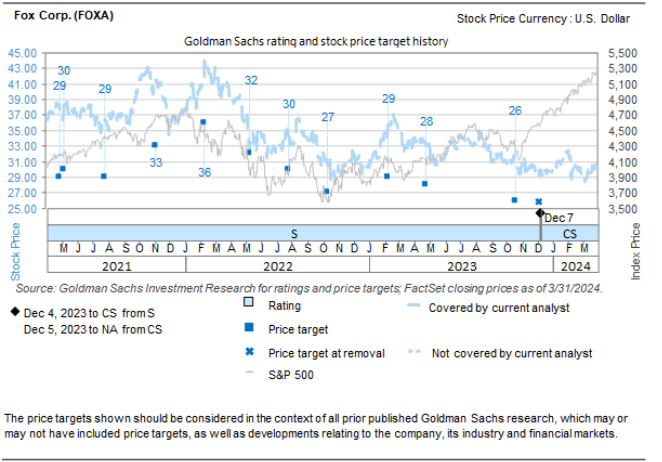
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