

Advisory Blog

Timely insights on the issues that matter most to advisors and their clients

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High Conviction Active

[Artificial Intelligence from a Value Perspective: Enabling the Evolution of Compute Power](#)

By: [Aaron Dunn, CFA](#) | & [Bradley Galko, CFA](#) | April 24, 2024

KEY POINTS

- 1. AI opportunity expands beyond the growth darlings that were the immediate and primary beneficiaries over the past year.
- 2. Utilities experienced the largest historical relative underperformance to the broader market in 2023; in our view, the reward relative to risk is now quite compelling for a sector that is experiencing an inflection in fundamentals.
- 3. We believe renewables, such as solar and wind, combined with battery storage, will play an increasing role in behind-the-meter power solutions.

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