Insights

Cloud Computing: The Backbone of Global Connectivity

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The modern Digital World is linked by ever improving connectivity and is supported by the technological backbone of cloud computing. Cloud computing is the centralization of computing power into massive, well connected data centers. The underlying computations of a user's interaction with apps on their smartphones or with their virtual office occurs in these data centers, in the cloud. And big data is big business. The global 'big data' market is currently estimated to be worth $56 billion and is forecast to nearly double over the next 6 years.

At Dominion we love structural trends like the Digital World because they offer us the opportunity to invest in high quality, long-term growth companies that generate strong returns for our investors. The Digital World will be the backbone of the future global economy. As the world and all of our of lives become increasingly digital, the infrastructure, systems and platforms that facilitate this become increasingly important. This is the Digital World Trend.

We are invested in the enablers of this trend, the companies that own the technology and business models which facilitate the Digital World. The microchip technology that allows devices to connect wirelessly and seamlessly to the internet and the businesses that develop and own the cloud infrastructure to enable a future with billions of people and devices connected to the internet, these are our investment focus for this Global Trend and we are bullish on the outlook for many years to come.

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