

Thematic Spotlight

ROBOTICS & AI

February 2026

Model Portfolio Solutions

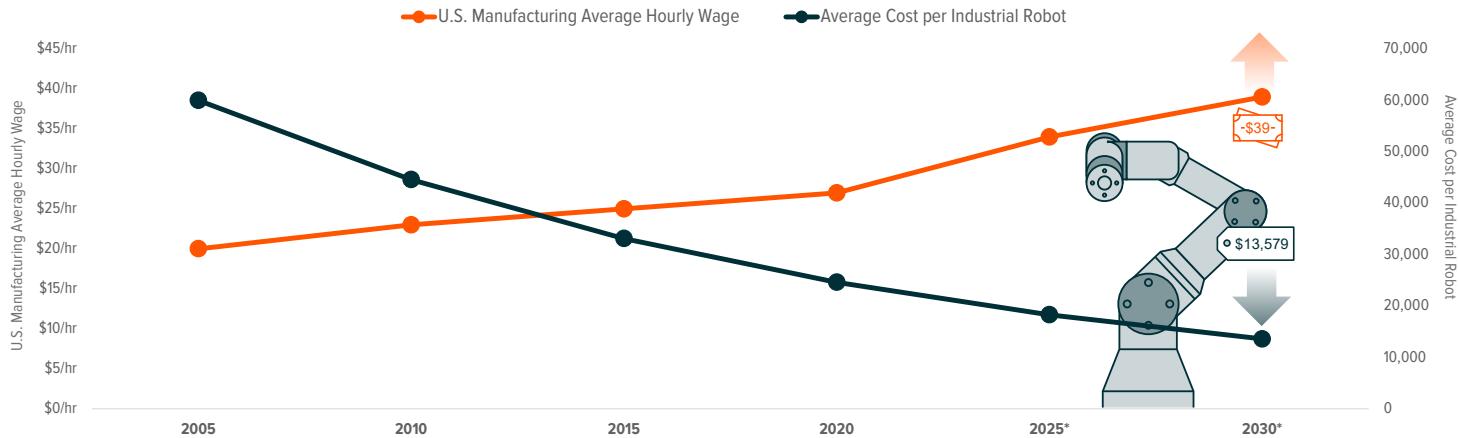
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Robotics is the next step in the AI story. If AI is the brain, robotics are the body. As AI models become more capable and robotic hardware becomes more versatile and affordable, we're entering the era of physical AI.

We believe this exposure is well positioned for 2026. Deglobalization is a key trend that supports accelerated robotics adoption. Automation helps bridge the labor gap, offsetting higher domestic wages with increased efficiency and productivity.

MANUFACTURING WAGES VS AVERAGE COST PER INDUSTRIAL ROBOT



*Forecast

Sources: Global X ETFs forecast with information derived from: Klump, R., Jurkat, A., & Schneider, F., Nov 2021; Cette, G., Spiezio, V., & Nobile, C., 2022; FRED, Aug 2025.

RECENT MILESTONES AND ADVANCEMENTS

Humanoid Robot Nears Real-World Deployment:

- Boston Dynamics' Atlas is moving into commercialization, with Hyundai targeting deployment—including potential rollout at its Georgia factory ahead of 2028.¹

Warehouse and logistics automation is accelerating:

- Autonomous Mobile Robot (AMRs) and vision-guided systems are scaling across distribution centers, boosting throughput and efficiency.

Autonomy Spillover to Industrial Robotics:

- Self-driving advances in perception and planning are increasingly powering factory-floor automation and material movement.

RATIONALE FOR INCLUDING ROBOTICS & AI THEME

Why is this an important theme for now?

- We believe robotics are the future of manufacturing, construction, and several other industries. The structural trend of reshoring increases the importance of using technology to be competitive and the advancements in AI are driving exciting breakthroughs in this theme.

How does this theme works within a portfolio?

- Robotics has minimal overlap with broad beta exposure in the U.S. or globally.
- Japan is a key exposure due to its strength in manufacturing robots for industrial applications.

1. Business Insider, Boston Dynamics CEO says his humanoid robot will need to be able to learn a new task within 48 hours before it's deployed, 1/9/2026



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