

Dedicated Research Analysts

Zeno Mercer and Rafael Silva are dedicated research analysts to the ROBO Global Index Series and have the primary responsibility for maintaining the ROBO Global Industry Classification System, including universe selection, sub-sector classification, and company scoring.



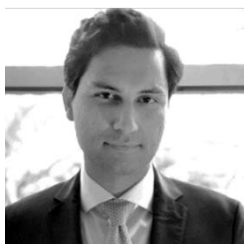
Zeno Mercer Strategy Lead, Senior Research Analyst

Zeno brings over a decade of experience in research, due diligence, growth strategy, and partnership development across enterprise SaaS, healthcare, artificial intelligence, and robotics.

Prior to joining ROBO Global, which was acquired by VettaFi in April 2023, Zeno worked at Bluemont Partners as a Principal Consultant supporting clients across numerous industries and stages with fundraising, growth and partner strategy, research, due diligence and project management.

Prior to Bluemont, Zeno worked in enterprise SaaS at Transperfect, the world's largest provider of language and LegalTech services, and HighQ, a London-based enterprise collaboration SaaS company acquired by Thompson Reuters. In these roles he helped build out cross-selling capabilities, integrating new AI and security technologies, conducted go-to market research and strategy work, and honed product design for clients in private equity, venture capital and Fortune 500.

Zeno started his career in Investor Relations and Portfolio Monitoring at Stepstone Group, a global private markets firm with over \$100 billion in AUM covering venture capital, growth equity, real assets and large buyout strategies. Zeno graduated from the University of Tennessee Gary Rollins College of Business.



Rafael Silva Index Research Analyst

Rafael joined VettaFi in 2021, where he specializes in healthcare and technology research. His journey at the company began as an Index Developer, focusing on creating and managing thematic indexes within the pharmaceutical and disruptive technology sectors.

Prior to his role at VettaFi, Rafael held positions in London, Mexico City, and NYC. He served as the Head of Product for a blockchain fintech company, worked as a financial advisor, and successfully founded his own venture. Rafael brings over a decade of experience to his role as a Research Analyst at VettaFi and holds a BSc degree from Cass Business School, in Banking and International Finance.

Strategic Advisory Board

The ROBO Global research team is advised by several world-renowned experts in robotics and artificial intelligence, including 4 PhDs and two Engelberger award winners (equivalent to the Nobel prize for robotics). The strategic advisory board works closely with our research team to identify early key industry trends and associated companies.



Daniela Rus, PhD

Daniela Rus is the Director of CSAIL at MIT. She serves as the Director of the Toyota-CSAIL Joint Research Center and is a member of the science advisory board of the Toyota Research Institute.

Rus's research interests are in robotics and artificial intelligence. The recipient of the 2017 Engelberger Robotics Award from the Robotics Industries Association, she is also a Class of 2002 MacArthur Fellow, a fellow of ACM, AAAI and IEEE, and a member of the National Academy of Engineering and the American Academy of Arts and Sciences.

Daniela earned her PhD in Computer Science from Cornell University.



Henrik I. Christensen, PhD

Dr. Henrik I. Christensen is the Qualcomm Chancellor's Chair of Robot Systems and a Distinguished Professor of Computer Science at Dept. of Computer Science and Engineering, UC San Diego. He is also the director of the Contextual Robotics Institute.

He is an academic doing research on robotics and artificial intelligence, the main editor of the US National Robotics Roadmap, and an entrepreneur. He has co-founded multiple companies including Robust.AI, Christensen Consulting Group, AeroScan, and Intelligent Machines. He is also engaged in investments in publicly traded companies and start-ups through companies such as ROBO Global (co-founder) and Spring Mountain Capital (advisor).

Dr. Christensen does research on robotics and AI, with an emphasis on a systems view to problems. The research has been published in 350+ contributions across AI, Computer Vision, and Robotics. The research has been adopted by companies such as Electrolux, ABB, KUKA, Weda, BMW, Boeing, iRobot, PerMobil, and General Motors. He serves as a consultant to agencies and companies across four continents.



Wyatt Newman, PhD

Wyatt Newman is a leading researcher in the areas of mechatronics, robotics and computational intelligence, in which he has 12 patents and over 130 technical publications. After earning degrees from Harvard College, MIT and Columbia University, he was named an NSF Young Investigator in robotics, and subsequently was named a Herbold Fellow, a Tau Beta Pi “distinguished engineer,” a Woody-Flowers FIRST-robotics mentor awardee, and a CWRU awardee for teaching and for leadership. In 2007, he led “Team Case” in the DARPA Urban Challenge, involving autonomous vehicles operating among live and robotic traffic.

In addition to visiting appointments at Sandia Labs, NASA, and Princeton, Wyatt has held international appointments at Philips (Eindhoven, The Netherlands), as a Distinguished Visiting Fellow at U. Edinburgh, and The Hung Hing Ying Distinguished Visiting Professor at U. of Hong Kong. Prof. He also led HKU’s team in the DARPA Robotics Challenge, involving humanoid robots for disaster response.



Illah R. Nourbakhsh, PhD

Illah R. Nourbakhsh is K&L Gates Professor of Ethics and Computational Technologies at Carnegie Mellon University, inaugural Executive Director of the Center for Shared Prosperity, and co-director of the Community Robotics, Education and Technology Empowerment Lab. He earned his PhD in Computer Science from Stanford University. In 2009 the National Academy of Sciences named him a Kavli Fellow. In 2013 he was inducted into the June Harless West Virginia Hall of Fame. He was previously Robotics Group Lead for NASA/Ames during the MER landings. In 2019 he was named a Hastings Fellow. He has co-authored textbooks and popular literature, including Robot Futures. He is a trustee of the Claude Worthington Benedum Foundation, Winchester Thurston School and the Southwestern Pennsylvania Environmental Health Project.



Louis-Vincent Gave

After receiving his bachelor’s degree from Duke University and studying Mandarin at Nanjing University, Louis joined the French Army where he served as a second lieutenant in a mountain infantry battalion. After leaving the army, he worked as a financial analyst with Paribas in Paris and Hong Kong. He then launched Gavekal Research with Charles Gave and Anatole Kaletsky in London in 1999. He has written seven books. The latest, *Avoiding the Punch*, was published in August 2021.

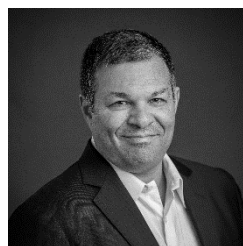


Morten Paulsen

Morten Paulsen is the Head of Research and a Managing Director at CLSA Japan. He has covered the Japanese robotics and machinery industry as a Tokyo-based equity analyst since 1999. Morten was among the first financial analysts to highlight the Asian Automation trend as an underlying driver for the sector over a decade ago, and he has built strong relationships with automation equipment suppliers and system integrators across Asia. Morten joined CLSA Japan from WestLB Securities Pacific in 2003, and he has received numerous awards for his research. He was ranked number-one in his field by AsiaMoney every year from 2007 to 2013 (the segment was discontinued in 2014).

Key Supporting Team Members

The ROBO Global research team is fully supported by the broader VettaFi research and index teams, including industry leaders in index design and thematic investing.



Brian Coco Head of Index Products

Brian Coco is the Head of Index Products for VettaFi. He is currently responsible for Index Production, Index Product Development and Index Data. Brian brings over 20 years of experience in indexing across Equities, Fixed Income, and Derivatives. He mostly recently served as Head of Indices as JPMorgan Asset Management where he was responsible for all self-indexing activities as well as index licensing. He has also headed Quantitative Investment Strategies for CIBC and spent 15 years at Credit Suisse in various Quantitative Index Research roles.

Brian graduated from Ithaca College with a Bachelor of Science in Finance and holds FINRA Series 7 & 63 licenses.



Jane Edmondson Head of Thematic Strategy

Jane Edmondson is co-Founder of EQM Indexes, which was acquired by VettaFi in September 2023. EQM Indexes was an industry leader in the area of thematic and bespoke index design. Ms. Edmondson is a former Quantitative Portfolio Manager with Allianz Global Investors and its predecessor firm Nicholas-Applegate. She started her career at Merrill Lynch and has more than 30+ years of experience in the investment industry.

Jane has a BA from UC Irvine and an MBA in Finance from San Diego State University. She is FINRA Series 66 licensed.



Todd Rosenbluth
Head of Research

Todd Rosenbluth is the Head of Research at VettaFi. He oversees the firm's research into ETFs, product trends and advisor behavior. He previously was head of ETF & Mutual Fund Research at CFRA. Todd is frequently quoted in the financial press at outlets like the Barron's, the Financial Times, Investment News and the Wall Street Journal, has spoken at various ETF conferences.



Richard Lightbound
Senior Advisor

Richard Lightbound severed as co-CEO for ROBO Global, which was acquired by VettaFi in April 2023. In addition to managing daily operations in Europe and Asia, he was responsible for executing the firm's global business strategy.

Richard has worked for over 20 years within the financial services sector with Wells Fargo and Standard Chartered Bank in senior management positions with responsibility for Institutional and Corporate clients across Europe, MENA and Asia. He enjoyed a 7-year break from banking to join an early cloud computing company funded by Warburg Pincus (now part of Infor) where he launched and managed operations across Asia and Europe.

A frequent speaker at Robotics & Automation conferences and events, he has lived and worked in Hong Kong, USA, Europe, and Sri Lanka.



Brad Baker, CFA
CTO, Index Operations

Brad Baker served as Chief Technology Officer and Chief Operations Officer for ROBO Global prior to its acquisition by VettaFi in April 2023. He currently is CTO of Index Operations. With over 20 years of industry experience, he has held leading roles in quantitative research, portfolio construction, data management, internal systems development, global equity trading, and compliance.

Brad earned a BBA in Finance from the University of Texas at Arlington, graduating Summa Cum Laude. He was awarded the Chartered Financial Analyst (CFA) designation in 2004 and is a member of the CFA Institute.

About VettaFi

VettaFi is a provider of indexing, data & analytics, industry leading conferences, and digital distribution services to ETF issuers and fund managers. It operates the ETFdb, Advisor Perspectives, and ETF Trends websites and the LOGICLY portfolio analytics platform—engaging millions of investors annually—empowering and educating the modern financial advisor and institutional investor. VettaFi owns and administers the ROBO Global Index Series. For more information, please visit: www.vettafi.com.

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About the Index Series. The ROBO Global Index Series seeks to track the combined performance of a basket of global stocks that identify subsectors of suitable product and technology maturity to the robotics and automation, artificial intelligence, and healthcare innovation themes. These subsectors carry high growth and earnings potential and are regularly screened to identify companies that are publicly traded, meet a minimum robotics revenue threshold, are positioned as technology and growth leaders, and satisfy our ESG Policy. The Index and its trademarked name are the exclusive property of VettaFi.

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