

Fund Objective:

Makeda Fund invests in US companies with female CEOs. We believe this asset class is well-managed and exhibits strong value creation for long-term holdings. The long-only fund is a diversified, multi-cap, equity fund holding companies with greater than \$500 million in revenue. Exclusions are tobacco, firearms and gambling.



[Makeda Interview with Dr. Lisa Su, CEO, Advanced Micro Devices \(Nasdaq: AMD\)](#)

MC: What are the key growth areas you see for AMD in the next 3 years?

LS: The industry is entering a new era defined by billions of connected devices and the emergence of immersive computing experiences that seamlessly blend the physical and digital worlds. By 2020 there are expected to be more than 50 billion connected devices generating significant amounts of data that can be used to improve everything from an individual's health to how we more effectively manage natural resources at the global level. These devices along with immersive computing technologies like virtual and augmented reality will fundamentally change how we interact with technology on every level. To power this world, high performance computing and graphics technologies are the key and represent a \$60 billion market for AMD.

MC: What are the biggest challenges you see to achieving your company's growth objectives?

LS: When you combine the fast pace of change within our industry with the multi-year design cycles of high-performance chips it becomes difficult to plan with 100% certainty what the future will hold. We are making bets now that will take five years to pay off. Our biggest challenge is to ensure we are making bold, calculated investments around the right technology trends so that we are continuously creating innovative new products and solutions that will allow us to stay one step ahead of the competition.

Makeda Fund Performance

Performance Data Available Upon Request

MC: How are you setting up the company's team and priorities to compete and excel in your industry?

LS: For more than 46 years, AMD has been defined by innovating at the leading edge of technology. Our greatest successes have come from making significant bets ahead of the industry. Our culture is focused on three things: (1) first and foremost, building great products by "planning innovation," (2) forming deep and lasting partnerships with our customers because we believe in "shared innovation," and (3) simplifying every process and decision to ensure that we are fast, flexible, and adaptable in this incredibly fast-paced market.

MC: What experiences have shaped your leadership?

LS: I have always enjoyed being at the intersection of technology and business. I spent my early career at IBM and it gave me a strong foundation in technical management, business management, and people management. It was fascinating to watch leaders like Lou Gerstner think through very large and complex problems. I joined Freescale Semiconductor to be part of a smaller company and going from an \$80 billion company to a \$5 billion company was a learning experience as well. I started first as CTO and then migrated to run the Networking and Multimedia business. AMD is certainly a great experience for me combining all of my technical, business, and leadership experiences. I love competing and winning and with our technology, we have the opportunity to really shape the future of the semiconductor business. That's what makes it very exciting.

Notable Articles: Women in the News:

- [On the road to parity: Gender lens investing](#)
- [Why Are There So Few Women in the C-Suite](#)