

In Focus The Future of Warfare



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The Global Race for Technological Dominance

As technology advances, so do our defense strategies.

The next global superpower will be determined by its dominance in data acquisition and processing.

The nations that lead in technological innovation will dominate global power dynamics, as advancements in AI, cybersecurity, and quantum computing reshape military and economic strength.

From Tanks to Tech



Modern defense strategies have expanded beyond traditional tank warfare to incorporate advanced technology-driven solutions.

Drones, precision-guided missiles, and cyber warfare have become dominant, offering greater efficiency without the traditional challenges of heavy armor.

Artificial intelligence and surveillance systems now play a crucial role in battlefield awareness, along with cross-channel communication and coordination.



Additionally, electronic warfare and space-based assets provide strategic advantages that tanks alone cannot match, reflecting a transition toward high-tech, networked warfare.

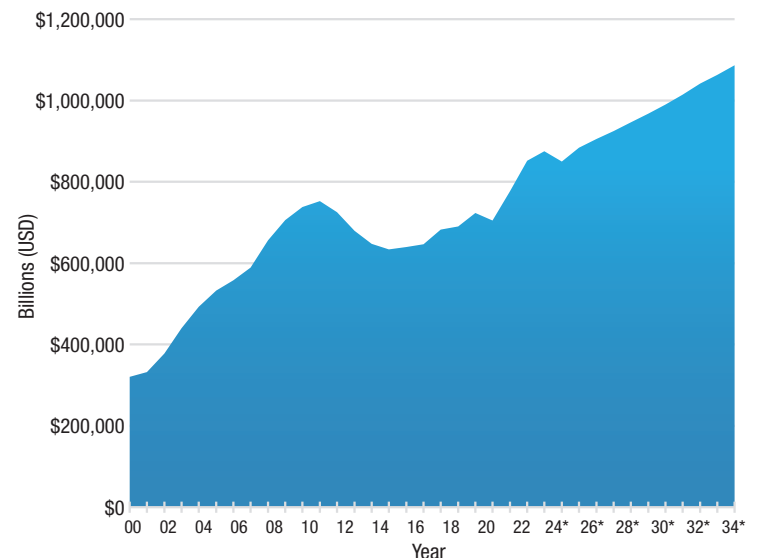


Capital from both public and private sectors is contributing to the innovation and cutting-edge solutions that enhance these defense capabilities.

Companies investing in leading edge defense technologies- such as AI, cybersecurity, drones, and space-based systems- are making crucial strategic decisions for future security and innovation.

US defense budget heading towards \$1 Trillion USD.

Defense outlays and forecast in the United States from 2000 to 2035



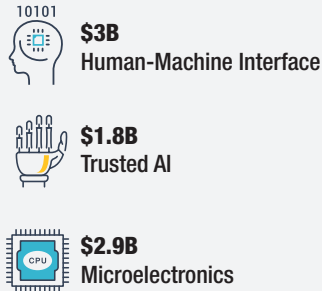
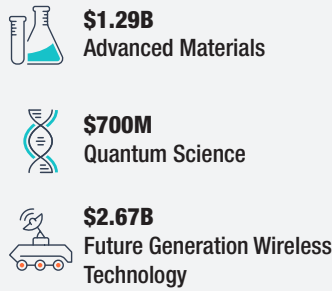
Source: Congressional Budget Office (2024, June). The Budget and Economic Outlook:2024 to 2035. Note *Indicates forecast

How Defense Is Evolving ▶ The Future Conflict

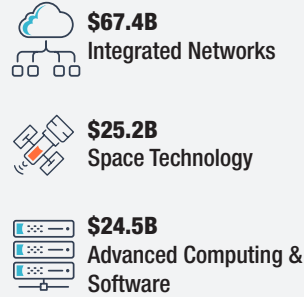
Technology is the Primary Area of Strategic Competition

The U.S. Department of Defense defines 12 technologies as dual-use, disruptive, emerging, or “critical” to national and economic security. Here are the 12 technologies along with the DoD’s projected spending for 2025¹.

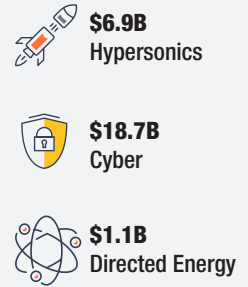
Emerging Opportunity Areas



Effective Adoption Areas



Defense Specific Areas



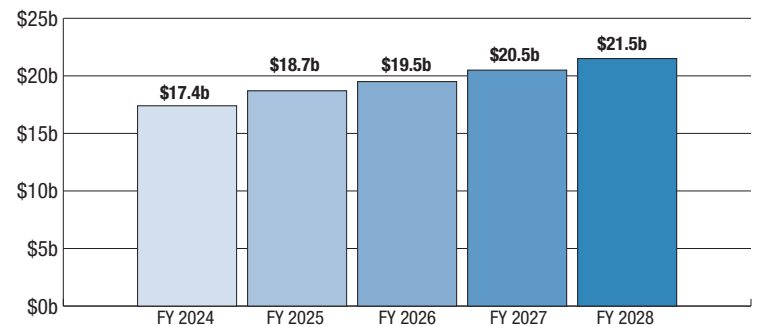
Growth Drivers

Five categories are major drivers that continue to spur demand for government-wide and agency budget investments.

- **Threat Environment** - The different ways hackers and cybercriminals can attack networks, devices, data and infrastructure.
- **Technology Policy** - The guidelines and rules organizations must follow to keep their systems secure, often set by the government.
- **Acquisition Policy** - Cybersecurity is a growing requirement when organizations purchase new technology.
- **Technology Solutions** - Tools and strategies to protect data, including new technologies that need strong securities to be widely used.
- **Workforce Strategies** - Training and hiring the right people to lead and protect against cyber threats.

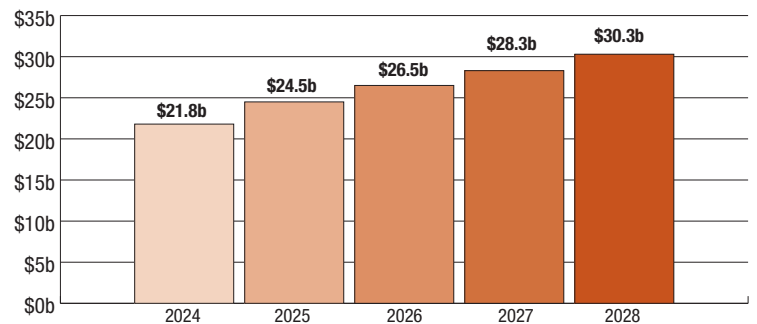
Federal Cybersecurity Contractor Addressable Market²

FY 2024 - 2028



Forecasting Federal Demand for Vendor Furnished Cloud Computing³

FY 2024 - 2028



⁽¹⁾Source: <https://www.congress.gov/bill/118th-congress/house-bill/2670/text>
^(2,3)Source: Deltek

Get Exposure to Companies Leading Defense Technology

The Pacer Solactive Whitney Future of Warfare ETF (FOWF) offers investors exposure to companies supporting emerging defense technologies in the U.S. and its allied nations.

FOWF
Pacer Solactive
Whitney Future of
Warfare ETF

There is no guarantee that this investment strategy will succeed, the strategy is not an indicator of future performance and investment results may vary. The investment strategy presented is not appropriate for every investor and individual clients should review with their financial advisors the terms and conditions and risk involved with specific products or services.

Speak with your financial advisor today to learn how to best incorporate the Pacer Solactive Whitney Future of Warfare ETF (FOWF) into your portfolio.

For more information, visit www.paceretfs.com.

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