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A keep-it-simple long term growth portfolio that is hard to beat:

E-commerce: \$AMZN \$SE \$MELI \$SHOP

Fintech: \$PYPL \$SQ \$ADYEN \$V \$MA

Cloud: \$CRM \$NOW \$TEAM \$TWLO \$ADBE \$MSFT

Digital Ads: \$FB \$GOOG

Media: \$NFLX

Gambling: \$EVO

Consumer: \$AAPL

Semi: \$NVDA \$TSM \$ASML