



IMMERSION INVESTMENTS

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Immersion Investment Partners, LP
2026 Annual Meeting
April 30, 2026

Dear Partners,

Below are the links to our pre-recorded annual meeting and slide deck. As we shared last year, we moved to a pre-recorded format after noticing that most LPs prefer watching the meeting at their convenience.

Given the significant overlap between the content and timing of the annual meeting presentation and what we would normally cover in our first quarter letter, this presentation will serve as our Q1 communication. We will resume our normal written letter format with our Q2 communication, which will be sent in late July or early August.

We appreciate your trust in us, and as always, please reach out with any questions or comments.

[2026 Annual Meeting Presentation](#)

Passcode: w9@&CnR3

[2026 Annual Meeting Slide Deck](#)

With appreciation,

Tim and David