Investing Strategy

Disclaimer

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Strategy Overview

Our Specialty

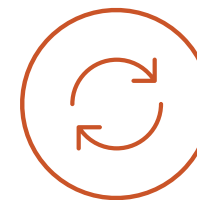Actively managed portfolios of high-conviction stocks

Your Portfolio

Bespoke blend of 20-30 core holdings and special situations

Thorough Research

Structured review of financial statements and independent forecasts

Ongoing Analysis

Continuous research cycle, risk monitoring, and asset rotation

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Why we choose stocks

First Rate Asset Class

Stocks have more than a 200 year track record of outperforming for the long-term investor

Versatile Objectives

Portfolios can be designed for a variety of strategies, including: capital appreciation, income generation, or inflation hedging

Selecting for Quality

A focused portfolio of individual stocks can outperform market averages targeted by index ETFs

Fine Tuning

A portfolio of 25 stocks has many more potential adjustments than one consisting of a few ETFs

Asset Class	Annualized Return
Stocks	6.9%
Bonds	3.6%
Bills	2.5%
Gold	0.6%
US Dollar	-1.4%

Stocks $2,334,920
Bonds $2,163
Bills $245
Gold $4.06
US Dollar $0.043

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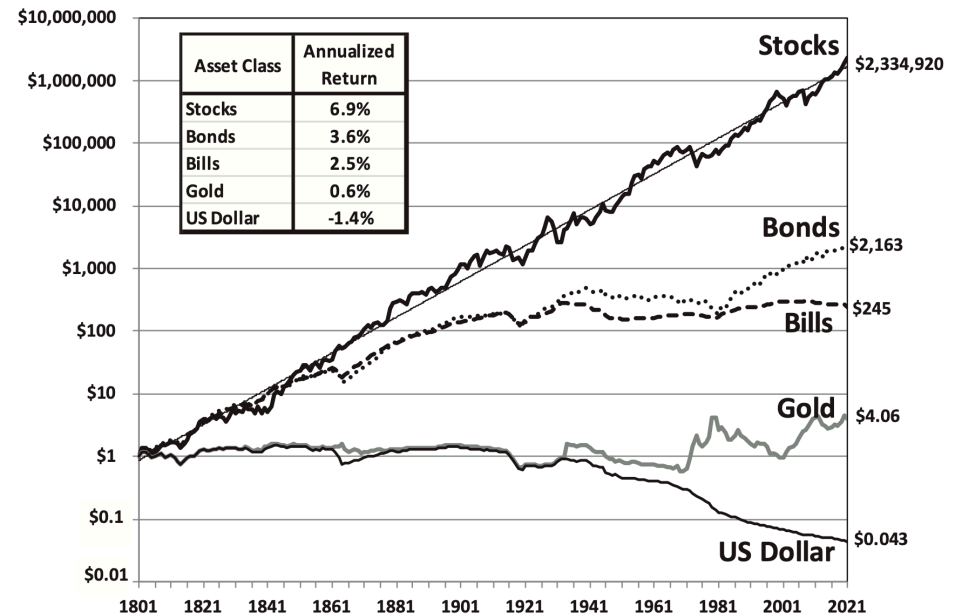
An example portfolio
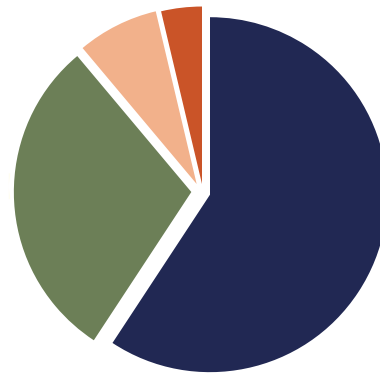
Core Holdings
Stable and predictable stocks don't have to grow slowly

Special Situations
Great opportunities remain overlooked by the market

Income Generation
Plenty of assets beyond bonds provide regular income

Client Requests
We'll balance the rest of your portfolio against your favorite stocks

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How we find great stocks

Search Everywhere
Large institutions often ignore small companies due to liquidity. Popular financial news tends to focus its reporting on trendy companies. We cast our net high and wide to find the best opportunities.

Focus on Quality
Categorizing stocks as either growth or value is overly simplistic. We look for stocks displaying growth, value, and several other factors such as management temperament, brand value, and strategic positioning.

Run the Numbers
Financial statements are regulated and standardized while promises from management may be misleading. We focus on credibility and use independent forecasts in our research.
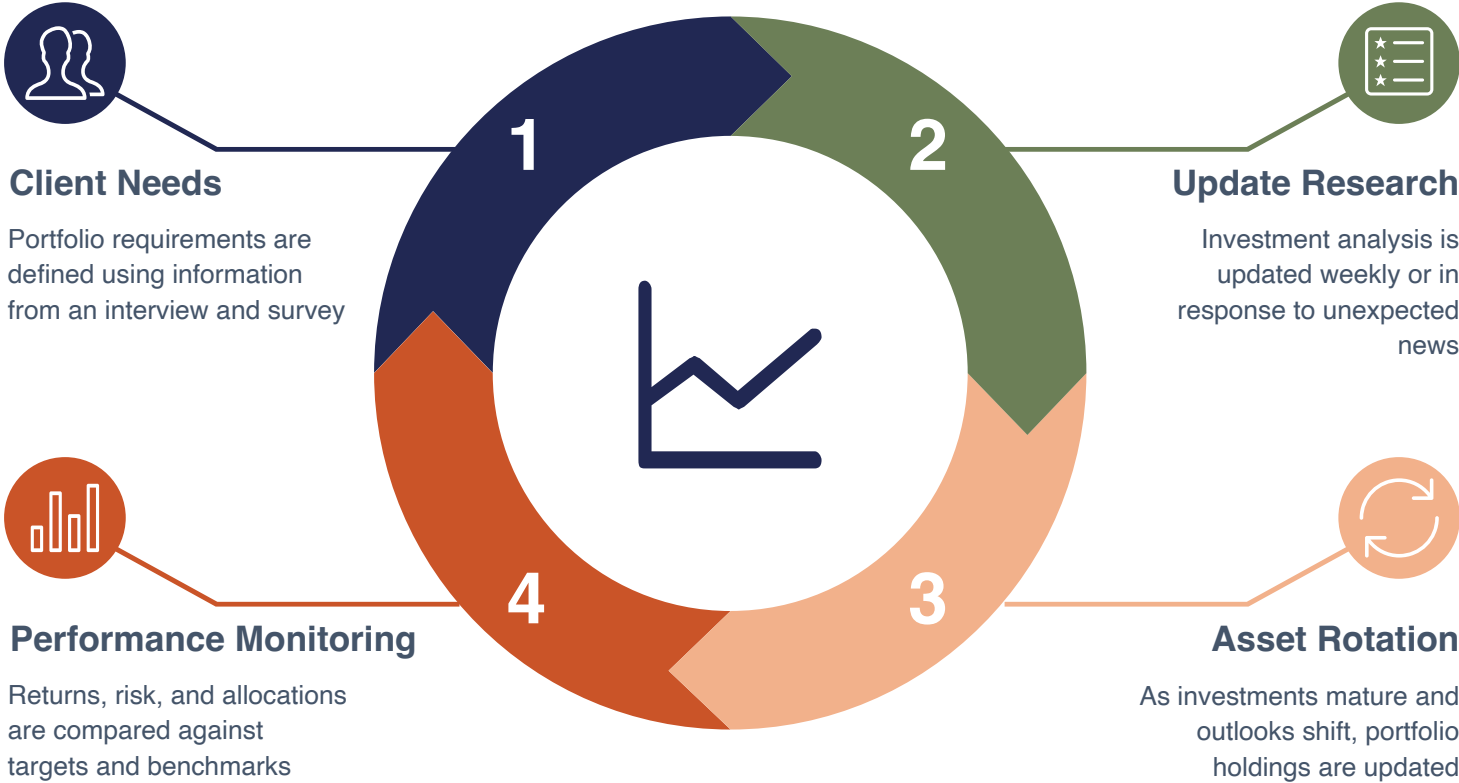
Check for Red Flags
Popular valuation metrics can be manipulated with deliberate accounting techniques. Digging deep into the numbers can uncover the true story.

Ignore the Noise
Politics and headline news rarely affects the market over the long-term. It's important not to overreact to irrelevant information.

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We constantly optimize

Client Needs

Portfolio requirements are defined using information from an interview and survey

Update Research

Investment analysis is updated weekly or in response to unexpected news

Performance Monitoring

Returns, risk, and allocations are compared against targets and benchmarks

Asset Rotation

As investments mature and outlooks shift, portfolio holdings are updated

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