EQUITY INVESTING

PHILOSOPHY____

As value-oriented portfolio managers, we strive to achieve superior long-term performance with below average market volatility.

- Overweighting sectors with attractive economic and valuation characteristics
- Utilizing a multi-factor valuation approach to analyzing companies
- Developing concentrated and, generally, equal-weighted portfolios

INVESTMENT PROCESS

Assess
Needs

Determine
Sector
Weightings

Conduct
Equity
Analysis

Construct
Portfolio
Rebalance