

FIXED INCOME INVESTING

PHILOSOPHY

As an active fixed-income portfolio manager, our mandate is achieving consistent long term performance with less than market risk.

- Overweight fixed investment alternatives with appealing interest rate sensitivity relative to economic assumptions and historical valuation comparisons
- Utilizing a multi-disciplined approach in analyzing duration, yield curve, convexity, and sector allocation to determine relative attractiveness
- Develop diversified portfolios with particular attention to issue selection

INVESTMENT PROCESS

