

Investment & Portfolio Management



Invest in better.

Equity Management

Each investment portfolio at Reynders, McVeigh Capital Management is tailored to meet the specific requirements of each individual client. Generally, the number of holdings in a portfolio ranges from 30-40, providing ample diversification. We tend to avoid heavily regulated and highly cyclical industries, and we are rarely correlated to S&P 500 or MSCI World Index market weightings.

Our equity management process is backed by our belief that stocks of well-established companies that are producing powerful earnings and an above-average opportunity for dividend growth, when purchased at a reasonable price, will provide superior returns over long periods. We seek out low-debt companies with progressive management teams. We look for industries that enjoy consistent or growing demand.

Our approach begins with a top-down macroeconomic view, then a bottom-up fundamental analysis for selecting companies. Transparency in the reporting of revenues and earnings is a critical factor in our discipline; we will only invest in companies where we can reasonably assess the risks that we are taking on a client's behalf. If we cannot see how and where a company is earning its money clearly on an income statement, we will not invest.

CURRENT HIGH-CONVICTION THEMES:



THE 21ST
CENTURY
CONSUMER



NEW PROCESSES
FOR A HEALTHIER
GLOBAL
ECOSYSTEM



EXPANDING
ROLE OF
INFORMATION
MOBILITY



REVOLUTION IN
HEALTHCARE
EFFICACY

Fixed Income Management

The purpose of the fixed income component of a balanced portfolio is twofold: it must generate assured income and provide stability in the investment mix. We do not believe in taking on undue risk in fixed income investments. We do not put principal at risk by purchasing suspect credits or inordinately long maturities. We seek out the highest-quality credits when constructing bond ladders for clients and will only consider U.S. Treasury instruments, foreign government bonds, and municipal and corporate offerings.

Bond portfolios are actively managed and carefully tailored to individual circumstances. Tax status, liquidity requirements, and income needs are all critical factors in establishing the right fixed income mix for each client. We carefully monitor activity along the yield curve and will alter or add maturities when it is to our clients' advantage or as current bonds mature.

FIXED INCOME MIX:



MUNICIPAL BONDS



US GOVERNMENT
BONDS



CORPORATE BONDS

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Passionately Independent

We are dedicated to a core investment discipline that provides both capital preservation and growth through full market cycles. We are contrarian in our discipline and believe that investors who “follow the herd” are at the greatest risk of missing the real opportunities ahead. We invest where we see compelling values across all market capitalizations.

We look for sustainable growth opportunities at home and abroad. We gain advantage by analyzing potential catalysts and company prospects over a three-to-five-year timeframe and believe that considered, strategic decisions serve clients better than tactical trading responses to short-term market fluctuations. We believe in the power of compounding returns and recognize the toll that taxes and transaction costs can take over time.

RISK MANAGEMENT

Liabilities can take root beyond the balance sheet. We gain better insight into how each prospective investment will fare across a range of economic scenarios through the proper integration of environmental, social, and governance (ESG) analysis, which we believe is a critical complement to our proven quantitative analysis. We aggregate 100 million pieces of data from more than 400 sources for our proprietary method of identifying externalities that can impact financial performance, and we consider our approach to be the highest fiduciary standard.

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