



Our Values

INFORMATION

The value of information has always been at the base of any advantage in the investment arena. We live in the first era of continuously available data, of all kinds, on every subject. It only makes sense we should capitalize on that advantage. We have made accessing, sourcing, validating and organizing data the foundation of our business.

ACADEMICS

Academics is at the heart of everything we do. At the foundation is the adaptive market hypothesis (AMH), combines principles of the well-known and often controversial efficient market hypothesis (EMH) the later work with behavioral finance. Andrew Lo, the theory's founder, believes that investors are mainly rational, but also overreact, especially during periods of heightened market volatility. We believe that the academics of stock selection is evolving rapidly.





TECHNOLOGY

The power of technology has changed the investment industry. We are not concerned with seeking a different result, but rather embrace the increasing use of technology by harnessing it for better results. We continue to add technological capabilities to our quantitative approach in order to be better design customized portfolios for the needs of institutional investors.,

INNOVATION

We have always been defined by our innovation and our commitment to improvement is unwavering. We strive for investment return as an objective, and look to efficiently capture it.

CUSTOMIZATION

We believe that customization is the way of the future. Rather than sell what we like, we ask what you need. Through this process, we have developed a robust suite of tools that enables us to solve for investor's priorities more effectively.

VALUE

Prices predictably vary around reasonable estimates of fair value because investors are emotional by nature. Understanding the variables that contribute to the value of a stock allows us to deploy technology to identify and confirm them efficiently. There are constant opportunities in the movements around fair value and our systematic strategies are designed to improve outcomes for our investors.

PATTERNS

Nature is the best source of patterns, the sequence plant growth, shell spirals, and even leaf arrangements have influenced architecture, design, and composition since the beginning. Companies also exhibit clear patterns, as do stocks and indices in general. Understanding and programming for patterns is foundational to our success.





INVESTORS

We strive for investment return as an objective, and look to efficiently capture it. However, our first responsibility is the safety of the assets that are entrusted to us. Our custodial relationships continuously invest in security technology and always evolve our processes with the safety and security of assets as our first objective. We manage funds as a fiduciary at every level, including the continuity of the firm, the people chosen for the team and everything in between.

RISK MANAGEMENT

All investment involves risk, but we seek to better understand and control risk at every level. Our systematic, rules-based approach incorporates various levels of risk management where and however possible. Our expertise, technology, and platform flexibility give our strategies the oversight they need to perform efficiently.

EMPOWERMENT

We are committed to making our research and technology driven strategies widely accessible, empowering investors to pursue their financial goals.

EXPLORATION

The nature of our business is forward-looking, requiring both a plan for tomorrow and a vision for the future. We continue scanning the horizon for new opportunities and challenges.

