Focused Equity Portfolio

Overview

The Focused Equity portfolio is an aggressive individual equity/ETF portfolio that aims to provide exposure to the market's strongest intermediate- and long-term investing themes.

The portfolio strives to provide long-term capital appreciation by utilizing a tiered allocation approach. It assigns higher allocation percentages to higher-conviction, long-term, and/or proven investments, and lower allocation percentages to lower-conviction, short-term, and/or speculative investments. The investment selection criteria centers around identifying investments with strong future earnings growth potential that are expected to play a significant role in their respective industries. The portfolio is primarily centered around individual stocks, though ETFs can also be held, and exposure levels are dynamic.

The overall risk level of the portfolio is considered to be aggressive. The appropriate investing timeframe is 5-7 years. The investment minimum is $50,000. Typical allocation: 60% - 100% equity.

A Tiered Approach

Tier	Explanation
High Conviction	The strongest, highest-conviction long-term holds. Established leadership. *(10.0%+ positions)*
Core Holdings	Names we want to own now and expect to be leadership in the future. *(5.0% - 7.5% positions)*
Speculative Plays	Future tech or speculative industries with high long-term upside. *(2.5% positions)*
Market Leadership	A single ETF holding that provides baseline exposure to our style of choice. *(5.0 - 10.0% position)*

High Conviction and Core Holdings tend to offer large-cap and growth exposure, whereas Speculative Plays tend to be mid- and small-cap ideas. The portfolio naturally gravitates towards companies that display high levels of innovation and/or disruption in their respective industries.

Summary

Investment Style:	*Equity*
Methodology:	*Active Equity Selection*
Asset Category:	*Individual Equities, ETFs*
Risk Level:	*Aggressive*
# of Holdings:	*10-20*
Investing Time Frame:	*5-7 Years*
Portfolio Minimum:	*$50,000*
Benchmark:	*S&P 500*

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