

The Gratry Global Equity strategy invests in large-cap companies in developed markets across the globe (including the United States). This portfolio reflects our belief in broad diversification across countries and economic sectors. We buy growth-oriented companies that meet our quality and valuation criteria

## *Firm Profile*

GRATRY & COMPANY, founded in 1981, is a private & independent, SEC-registered investment firm that specializes in managing international and global equity portfolios. The investment professionals at the Firm have over 85 years of combined investment experience.

## *Investment Style*

As growth investors, we seek to own companies we believe demonstrate the highest potential for growth over a 3-5 year period, yet sell for a reasonable price. We believe in broad diversification and tend not to trade a lot. We use a consistent, well-developed set of criteria when selecting securities for our portfolios.

## *Investment Approach*

We employ an *active, fundamental* investment process; focused on large-cap companies in developed markets; we combine top-down country selection with bottom-up security selection; we believe in broad diversification; our style is “Growth at a Reasonable Price”; our turnover is low; we own 35-40 stocks at any given time.

## *Security Selection*

Our security selection process centers on three primary characteristics:

- Growth Orientation
- High Quality
- Reasonable Valuations



## *Sell Discipline*

A stock will be sold when:

- Company fundamentals deteriorate
- Management deviates from stated objectives
- Share prices are deemed overvalued

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about our firm.

