

7 Key Reminders for an Investment Mindset

- “ There is **no guarantee** on account performance.
- “ **Investment managers have discretion** on investment decisions (Unless *restricted).
- “ **We will not invest based on popularity** but rather based on an analysis of the business and investment opportunity.
- “ We have **no skill in predicting market moves**, economic cycles, nor political events, etc.
- “ **We expect some investments will fail** to achieve the desired objective, thus the need for diversification and a broader view over multiple positions and time frames.
- “ **Investments performance should be judged on a time frame equivalent to a full market cycle.** That cycle is typically measured in years; five-year cycles are a general thought.
- “ **We are not seeking outperformance of all investments at all times.** If a popular momentum-driven pricing environment in any area of investments occurs, underperformance of that area is expected.



THANK YOU

Disclosures

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