

<u>OVERVIEW</u>

GROWTH EQUITY F

FIXED INCOME

Core Equity

The core equity team is focused on producing an above-average compound rate of return while also protecting capital in down markets. We seek to own high quality businesses that dominate a niche, maintain high barriers to entry, and have consistent demand across an economic cycle. With this dedication to quality, we look at stocks as if we were a potential acquirer of the entire business.

our core equity			ondition with equities priced be		
High Quality Small		High Quality SMID		High Quality Select	
Cap		Cap		Equity	
31 years	\$2,324 mm	19 years	\$13,257 mm	17 years	\$1,108 mm
History	Assets	History	Assets	History	Assets

CORE EQUITY INVESTMENT PROFESSIONALS



Chip Reed, CFA

Portfolio Manager

<u>SEE BIO</u>



Bill Bell, CFA Portfolio Manager

<u>SEE BIO</u>



Matt Hereford, CFA Portfolio Manager



Michael Jaje, CFA Investment Specialist

SEE BIO





INVESTMENT APPROACH

Our Core Equity team seeks to invest in companies in sound ?nancial condition with equities priced below our fair value estimate.

LEARN MORE



 ABOUT
 OUR TEAM
 PERSPECTIVES
 STRATEGIES

 PRIVACY & COOKIES
 YOUR PRIVACY CHOICES (7×)

DISCLOSURES/POLICIES ACCESSIBILITY

To report a website vulnerability, please go to Responsible Disclosure.

Atlanta Capital Management Company LLC ("Atlanta Capital") is part of Morgan Stanley Investment Management, the asset management division of Morgan Stanley.

For USA PATRIOT Act Disclosure Notice please click <u>here</u>.

NOT FDIC INSURED | OFFER NO BANK GUARANTEE | MAY LOSE VALUE | NOT INSURED BY ANY FEDERAL GOVERNMENT AGENCY | NOT A DEPOSIT

Page ID: 28073 - https://www.atlcap.com/core-equity.php

Publication details: Thursday, January 25, 2024 2:40 PM