

INVESTMENT STRATEGIES

(as of 12/31/23)

Atlanta Capital operates as an investment boutique with three investment teams leveraging a central investment philosophy. Our growth equity, core equity and fixed income teams offer both institutional and individual investors a broad range of high quality stock and bond portfolios. This focus on seeking quality investments – without compromise – underpins our approach in both investment selection and firm management, supporting our long-term track record.

FEATURED STRATEGIES

High Quality Select Equity

17 years
History

\$1,200 mm
Assets

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High Quality Calvert Equity

25 years
History

\$8,051 mm
Assets

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In partnership with Calvert Research and Management, Atlanta Capital has managed an ESG portfolio for 25 years.

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CORE EQUITY

Our core equity team seeks to invest in companies in sound financial condition with equities priced below our fair value estimate.

High Quality Small Cap

31 years \$2,549 mm

History

Assets

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High Quality SMID Cap

19 years \$14,781 mm

History

Assets

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High Quality Select Equity

17 years \$1,200 mm

History

Assets

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GROWTH EQUITY

Our growth equity team seeks to invest in companies with demonstrated histories of consistent growth and stability in earnings, with equities selling below intrinsic value.

High Quality Growth Plus

32 years \$587 mm

History

Assets

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High Quality Focused Growth

17 years \$2,177 mm

History

Assets

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High Quality Calvert Equity

25 years \$8,051 mm

History

Assets

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FIXED INCOME

Our fixed income team seeks to limit downside risk and to add value primarily through security selection within the government and AAA rated mortgage-backed and asset-backed security sectors, which historically have offered a substantial yield premium to government securities.

SHORT DURATION

High Quality Ultra Short Securitized

8 years \$81 mm

History

Assets

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High Quality Short Duration 0-2 Year

24 years \$216 mm

History

Assets

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High Quality Short Duration 1-3 Year

31 years \$724 mm

History

Assets

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High Quality Short Duration 1-5 Year

24 years \$0.5 mm

History

Assets

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INTERMEDIATE/CORE

High Quality Intermediate

31 years

History

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\$203 mm

Assets

High Quality Premier

30 years

History

\$164 mm

Assets

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