



INVESTMENT STRATEGIES

(as of 12/31/19)

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

13 years \$1,254 mm
History Assets
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High Quality Calvert Equity

21 years \$4,046 mm
History Assets
[LEARN MORE](#)



In partnership with Calvert Research and Management, Atlanta Capital has managed an ESG portfolio for 21 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

27 years \$2,255 mm
History Assets
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High Quality SMID Cap

15 years \$15,593 mm
History Assets
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High Quality Select Equity

13 years \$1,254 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

28 years \$377 mm
History Assets
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High Quality Focused Growth

13 years \$422 mm
History Assets
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High Quality Calvert Equity

21 years \$4,046 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 AAAA rated mortgage-backed and asset-backed security sectors, which historically have offered a substantial yield premium to government securities.

SHORT DURATION

High Quality Floating Rate

9 years \$5 mm
History Assets

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High Quality Ultra Short Securitized

4 years \$270 mm
History Assets

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High Quality Short Duration 0-2 Year

20 years \$241 mm
History Assets

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High Quality Short Duration 1-3 Year

28 years \$527 mm
History Assets

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High Quality Short Duration 1-5 Year

21 years \$0.9 mm
History Assets

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INTERMEDIATE/CORE

High Quality Intermediate

28 years \$272 mm
History Assets

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High Quality Premier

26 years \$160 mm
History Assets

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