



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.

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

26 years \$2,033 mm
History Assets
[LEARN MORE](#)

High Quality SMID Cap

14 years \$12,144 mm
History Assets
[LEARN MORE](#)

High Quality Select Equity

12 years \$772 mm
History Assets
[LEARN MORE](#)

CORE EQUITY INVESTMENT PROFESSIONALS



Chip Reed, CFA
Portfolio Manager
[SEE BIO](#)



Bill Bell, CFA
Portfolio Manager
[SEE BIO](#)



Matt Hereford, CFA
Portfolio Manager
[SEE BIO](#)



Michael Jaje, CFA
Investment Specialist
[SEE BIO](#)



INVESTMENT APPROACH

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

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