

## INVESTMENT STRATEGIES

(as of 3/31/24)

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

\$1,271 mm  
Assets

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#### High Quality Calvert Equity

25 years  
History

\$8,237 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

32 years      \$2,527 mm

History

Assets

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## High Quality SMID Cap

20 years      \$16,395 mm

History

Assets

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## High Quality Select Equity

17 years      \$1,271 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      \$618 mm

History

Assets

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## High Quality Focused Growth

17 years      \$2,314 mm

History

Assets

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## High Quality Calvert Equity

25 years      \$8,237 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      \$84 mm

History

Assets

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## High Quality Short Duration 0-2 Year

24 years      \$171 mm

History

Assets

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## High Quality Short Duration 1-3 Year

32 years      \$819 mm

History

Assets

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## High Quality Short Duration 1-5 Year

25 years      \$0.5 mm

History

Assets

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## INTERMEDIATE/CORE

## High Quality Intermediate

32 years

History

\$213 mm

Assets

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## High Quality Premier

31 years

History

\$182 mm

Assets

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