



INVESTMENT STRATEGIES

(as of 9/30/18)

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

12 years \$772 mm
History Assets
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High Quality Calvert Equity

20 years \$2,391 mm
History Assets
[LEARN MORE](#)



In partnership with Calvert Research and Management, Atlanta Capital has managed an ESG portfolio for 20 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

26 years \$2,033 mm
History Assets
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High Quality SMID Cap

14 years \$12,144 mm
History Assets
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High Quality Select Equity

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

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

27 years \$294 mm
History Assets
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High Quality Focused Growth

12 years \$128 mm
History Assets
[LEARN MORE](#)

High Quality Calvert Equity

20 years \$2,391 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

8 years \$5 mm
History Assets

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High Quality Ultra Short Securitized

3 years \$20 mm
History Assets

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High Quality Short Duration 0-2 Year

19 years \$305 mm
History Assets

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High Quality Short Duration 1-3 Year

27 years \$469 mm
History Assets

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High Quality Short Duration 1-5 Year

20 years \$172 mm
History Assets

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INTERMEDIATE/CORE

High Quality Intermediate

27 years \$259 mm
History Assets

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High Quality Premier

25 years \$152 mm
History Assets

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