SEVERIN
ASSET MANAGEMENT

LONG TERM GROWTH

Designed for investors seeking a globally diversified aggressive growth style portfolio.

Feature	Key Details
Positions	Around **80-100 stocks and ETFs**
Minimum Investment	**$100,000**
Inception Date	**August 31, 2013**

Investment Objective

This portfolio is for investors who want:

- Long-term capital appreciation
- Risk-managed equity strategy that balances quality fundamentals with growth potential
- Active portfolio management with sector rotation

Portfolio Construction

Evaluate economic environment to identify sector and asset class targets.

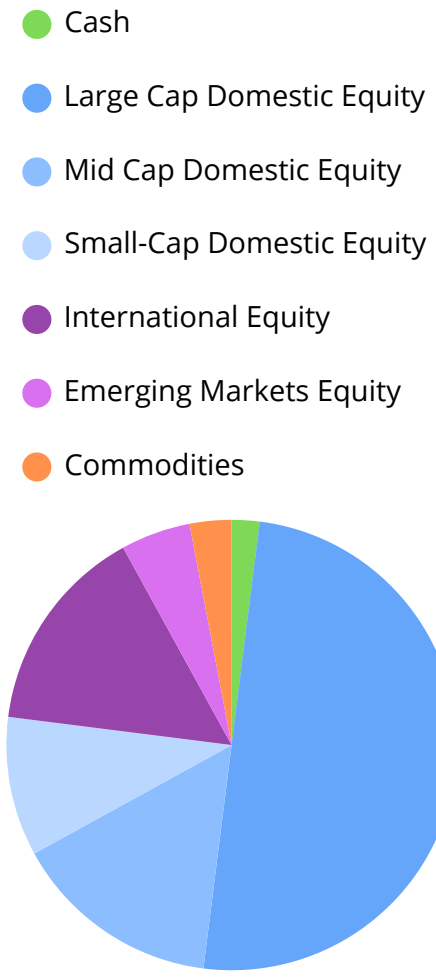
- Global equity exposure with a focus on US stocks.
- Balanced exposure to every GICS sector
- Over- and under-weight asset classes, sectors, and industries to adapt to market conditions.

Select stocks with best combination of:

- Quality Fundamentals
- Reasonable valuation
- Good Growth Potential

allocating **no more than 3% of portfolio to each**.

Allocate to ETFs as needed to meet asset-class targets where we cannot fill with individual stocks.



Asset Allocation

- 90 - 98% Equity
- 0 - 8% Fixed Income
- 2 - 10% Cash

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