



Pathfinder SMA, Unique Asset Management Platform, Features Tactical and Hedged Strategies

New investment strategies bring advantages over hedge funds and ETFs, with no performance fee

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MILL VALLEY, Calif.--(BUSINESS WIRE)--Bhatt Innovation Capital LLC, a San Francisco Bay Area-based registered investment advisor, has announced the launch of PATHFINDER SMA, an asset management platform offering features normally available only to institutional and ultra high net worth investors. PATHFINDER fund participation is available at a reasonable investment minimum, and can be customized to meet investors' requirements and adjusted according to market conditions.

PATHFINDER assesses investors' risk capacity and preferences for total return or income strategies, and then an actively managed portfolio is constructed in a separately managed account (SMA) at Charles Schwab. PATHFINDER SMA will allow for portfolio diversification, managing equities tactically through four proprietary investment strategies:

- PATHFINDER Advance L/S – equity long/short approach focused on technology, life sciences, and industrial advances. Available now.
- PATHFINDER StatArb – statistical arbitrage. Launching later in 2022.
- PATHFINDER Rotation – sector/industry/factor rotation. Launching later in 2022.
- PATHFINDER Value – long-only value investing. Launching later in 2022.

PATHFINDER Advance L/S and PATHFINDER StatArb are “alternative investments,” for which hedge funds typically charge high management and performance fees. PATHFINDER SMA charges a reasonable management fee, with no performance fee.

Fixed-income investments are also managed tactically and allocated through low-cost ETF products.

According to Vinit S. Bhatt, PATHFINDER SMA portfolio manager, “Today's investors are looking for expert advisors who can create customized allocations for their portfolios, including alternative strategies, at a reasonable cost. Our goal is to make these strategies available to all, not just high-net-worth investors.”

Hilarey Bhatt, M.D., who oversees life science investments for PATHFINDER, added, “Because we have the skills to evaluate companies operating in complex scientific and technical areas in-house, we can offer our clients investments in these fields with reasonable fees and also serve as an outsourced equity manager for other managers who need our expertise.”

PATHFINDER SMA’s custodian and prime broker is Charles Schwab. “Schwab will give our clients a sense of trust through full-transparency of their portfolio accounts,” said Vinit Bhatt.

Learn more at PathfinderSMA.com.

About Bhatt Innovation Capital LLC and PATHFINDER SMA

Bhatt Innovation Capital LLC (BIC) is a registered investment advisor. BIC founded and operated Bhatt Innovation Capital LP, a successful long/short equity hedge fund, for five years prior to launching PATHFINDER SMA. The fund's strategy laid the foundation for PATHFINDER Advance L/S. The BIC team launched PATHFINDER SMA to make alternative asset investing accessible to all investors and provide investors the benefits of separately managed accounts.

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