

# A Managed Risk Approach to Equity Investing

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Who we Serve

#### Institutional Investors



Institutional Investors demand the very best from their investment managers. Summit Global Investments principals have decades of experience managing investments through our "Managed Risk Approach to

#### $Financial \ Advisors$



As a trusted advisor you are continually seeking ways to help your clients protect the wealth you've helped them generate from their investments. We share this passion and drive in actively managing our strategies with our

#### INDIVIDUAL INVESTORS



You have worked hard to establish your investment portfolio. At Summit Global Investments we work hard in managing clients portfolios. Our strengths are as experts in managing downside risk across our strategies while participating Equity Investing" for Institutions and have worked with leading U.S. investment groups throughout our careers.

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"Managed Risk Approach to Equity Investing".

in the upside that the equity markets may offer.

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#### Our Approach

As Investment experts, we offer a unique view with our "Managed Risk Approach to Equity Investing". Our focus starts and ends with managing risk. This approach to investing in lower risk, lower volatility stocks gives us the opportunity to build portfolios that perform better, protect better, provide more diversification, and give investors a smoother ride.

Give us a call to discuss how we can help you to Reduce Risk while participating in the Upside.

CONTACT US

#### READ our MARKET COMMENTARY



April 8, 2019 Quarterly Market Commentary



April 8, 2019 U.S. Large Cap Commentary



April 8, 2019 U.S. Small Cap Commentary



April 8, 2019 Global Equity Commentary

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