# Our Philosophy

Our philosophy is based on the premise that large well-managed businesses that can grow their earning power by an average of 12-15% each year over a period of 5 years or more should generate very favorable returns for their owners when purchased at a reasonable valuation.

Learn More (/our-philosophy)

# Our History

After the sale of W.P. Stewart & Co. to AllianceBernstein in 2013, Bill formed WPS Advisors Ltd., a Bermuda company. A group of analysts was assembled to pursue an investment philosophy similar to the one that earned Bill's clients over 16% a year after fees for the 38 year history of W.P. Stewart and Co. The new business was domesticated to the US in 2017, as Stewart Asset Management, LLC, an SEC Registered Investment Advisor.

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Bill has always focused on the magic of mathematical compounding. He established W.P. Stewart & Co. in 1974 with a goal of doubling his clients investment, after fees, every five years. When he sold the firm 38 years later he had comfortably exceeded that goal. There were 35 five-year periods over that time and there was only one five year period in which a very small loss of capital was incurred.



Learn More (/about-wps)

# Investment Services

Identifying business prospects, valuing them and monitoring them is a highly research-intensive activity that requires a uniquely dedicated team of experienced professionals who think like business owners.

Learn More (/strategy)

> As a firm, we generally shun making dogmatic, speculative predictions about market fluctuations. It is more fruitful to try to understand if and how shares can be a profitable investment.

— Tom Valenzuela, Read more at Thoughts From The Chief Investment Officer (thoughts-from-the-chairman)

## Contact Stewart Asset Management

## About Stewart Asset Management, LLC

Stewart Asset Management, LLC is an investment advisory company that specializes in high quality, growing businesses. The foundation of Stewart Asset Management, LLC's investment philosophy is a well-developed investment process that employs a long-term fundamental analysis approach to investing, developed by Bill Stewart over the past five decades. Mr. Stewart and his associates generated average net annual returns of more than 16% after fees over W.P. Stewart & Co.'s 38-year history.

## Contact Us

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STEWART ASSET MANAGEMENT, LLC IS NOT AFFILIATED WITH W P STEWART & CO. INVESTMENT STRATEGIES EMPLOYED BY STEWART ASSET MANAGEMENT, LLC WERE ORIGINATED AT W P STEWART & CO. AND THE PRINCIPAL OWNERS OF BOTH FIRMS ARE THE SAME. ALL PERFORMANCE NUMBERS FOR STEWART ASSET MANAGEMENT, LLC ARE SHOWN NET OF OUR TYPICAL 0.80% ANNUAL CLIENT MANAGEMENT FEES AND TRANSACTION COSTS ASSOCIATED WITH THE FLAGSHIP PORTFOLIO. THE PERFORMANCE NUMBERS REFLECT THE TRANSACTIONS OF THE FLAGSHIP ACCOUNT OF STEWART ASSET MANAGEMENT, LLC FROM WHICH CLIENT'S ACCOUNTS OF STEWART ASSET MANAGEMENT, LLC ARE MODELED AFTER. THE FLAGSHIP ACCOUNT DOES NOT HAVE ASSET ADDITIONS OR WITHDRAWALS AND DIVIDENDS ARE REINVESTED. RESULTS PRESENTED ARE ACTUAL RESULTS FOR THE TIME PERIODS INDICATED. THE COMPARISON TO THE S&P 500 IS TO PROVIDE A COMPARABLE LARGE CAPITALIZATION INDEX TO THE STEWART ASSET MANAGEMENT, LLC FLAGSHIP ACCOUNT WHICH IS ALSO INVESTED IN MAINLY LARGE CAPITALIZATION U.S. EQUITIES. THE STEWART ASSET MANAGEMENT, LLC FLAGSHIP ACCOUNT IS A CONCENTRATED EQUITY PORTFOLIO WITH LESS POSITIONS THAN THE S&P 500 INDEX. PERFORMANCE CHARTS IN AND OF THEMSELVES CANNOT BE THE SOLE DETERMINANT IN MAKING AN INVESTMENT DECISION. DUE TO THE TIMING OF CLIENT'S INVESTMENTS IN THE STEWART ASSET MANAGEMENT, LLC STRATEGY WHICH IS PATTERNED AFTER THE FLAGSHIP ACCOUNT, CLIENT'S RETURNS MAY BE MORE OR LESS THAN THE ACTUAL PERFORMANCE OF THE FLAGSHIP ACCOUNT. THE PERFORMANCE OF THE FLAGSHIP ACCOUNT DOES NOT REFLECT ACTUAL CLIENT PERFORMANCE AS FEES AND TRANSACTION COSTS MAY BE HIGHER. PAST PERFORMANCE IS NOT PREDICTIVE OF FUTURE PERFORMANCE.

Stewart Asset Management, LLC

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