

Do you **own** your portfolio? Does it **serve you**?

## WHY KENSHO?

Investing is a competitive challenge. To succeed, investors need to *own* an investment strategy that is both financially sound, and *serves them*.

Many investors own generic portfolios, that resemble – or try to replicate other participants' portfolios, following investment “fashions”. Such portfolios are not always financially sound, nor always “outperform”. But moreover, they do not best serve the specificities of their investors, that as a result often have limited ownership and commitment of the investments,

We believe the key success factors in investing combine in designing thoughtful portfolios that serve the investor's specificities, that he/she fully commits to, and are based on robust financial methods.

*"Know what you own, and know why you own it."*

—Peter Lynch

## A DIFFERENT APPROACH

Building such portfolios requires a thoughtful dialogue between principals, and the advisor to have independent investment expertise.

Many investors are advised by junior employees of large firms, based on standardized investment templates, and with inherent conflicts of interest.

Instead, a patient, consultative dialogue is necessary to explore and identify what is specific about the investor. This dialogue needs to take place directly between principals, and to evolve and deepen over time.

Expressing these specificities into a well designed portfolio requires investment expertise, but also independence from external providers, to focus on the investor true best interests.

*"Nearly every aspect of fund management suffers from decisions made in the interest of the decision maker, not in the best interest of the fund."*

—David Swensen

We advise families and entrepreneurs whose perspective on the world requires a different approach to investing.

Increasingly, families and entrepreneurs wealth falls in between banks traditional customer segmentation: “wealth management” vs. “institutional”, and as such often does not receive adequate service, in which they are told to “trust and delegate”.

Instead, such families and entrepreneurs have a unique point of view on the world, that should be **actively leveraged and expressed** in the way they invest.

Our strategy is to work closely, with a limited number of investors, over a long period of time, so we can serve them with our full attention, operating between principals, as a trusted advisor. Our only source of compensation comes from our investors.

*“I don't care to belong to any club that will have me as a member.”*

—Groucho Marx

## WHO ARE WE?

Kensho Capital is a California based boutique investment advisor, serving family offices, entrepreneurs and other sophisticated investors.

Kensho Capital is fully independent and principal owned, and strives for impartiality in the true service of its clients' interests. We leverage our deep industry network of experts, including our investment partners in Europe, to offer a comprehensive range of services covering most asset classes and regions.

## CONTACT US

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