



CINCINNATI ASSET MANAGEMENT

Fixed Income Managers Specializing in U.S. Corporate Bonds

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PRESERVATION OF CAPITAL

Cincinnati Asset Management is a boutique, fixed income manager specializing in U.S. Corporate Bonds. Established in 1989 to build and manage high performance fixed income portfolios for individuals and institutions, our conservative and disciplined approach stresses preservation of capital, diversification, and high investment income. We have specialized in the management of corporate fixed income securities for our clients for over 30 years. We are an independent investment adviser registered with the SEC and structured

as a corporation that is employee owned. The strength of our Firm lies with our niche focus, commitment to our investment process and depth of experience of our Portfolio Teams, Managing Directors and employees.

RECENT INSIGHT

14 JUN 2019

Fund Flows & Issuance: According to a Wells Fargo report, flows week to date were \$1.7 billion and year to date flows stand at \$10.0 billion. New issuance for the week was \$6.5 billion and year to date HY is at \$113.2 billion, which is +19% over the same period last year. (Bloomberg) High [...]

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CLIENTS

INDIVIDUALS

Individual investors benefit from the same disciplined approach we apply to the management of portfolios of our institutional clients. We buy/sell securities in institutional size that typically is more efficient than smaller retail purchases. The individual investor participates in these larger trades and enjoys the same pricing that the institutional client receives.

INSTITUTIONAL

We focus on the needs of institutional clients, including pension plans, endowments, charitable organizations, and insurance companies. Our strategic investment philosophy, rather than a tactical trading approach, assures that the longer term requirements of these institutions are being met through disciplined investing. We are also able to tailor a portfolio to meet specific investment objectives.

APPROACH



Our investment process concentrates in the U.S. Corporate Bond market and offers solutions to investors which span the entire spectrum of credit quality from Investment Grade to High Yield. In all cases fundamental credit research is a primary element of our portfolio management process. Our approach stresses preservation of capital, diversification and high investment income.

CAM follows a conservative “bottom-up value” investment discipline that seeks out companies that are currently out of favor with investors, but poised to improve. The primary focus is preservation of capital with a secondary, but extremely important, emphasis on total return. Our portfolios are not managed to a benchmark from a portfolio construction perspective, but do look to outperform respective benchmarks over a full market cycle with less volatility. We do not utilize interest rate anticipation tactics. We look to minimize the impact of macro-economic factors, such as interest rate risk, from the investment process by employing defensive maturity structure within the portfolio

RESEARCH

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INVESTMENT SOLUTIONS

HIGH YIELD

For investors seeking potentially greater returns, this strategy focuses on bonds rated in the top two rating categories (BB & B). Securities rated CCC and lower are not eligible for purchase.

INVESTMENT GRADE

Designed for the more conservative investor interested in an intermediate, investment grade corporate strategy that provides a premium yield to Treasury securities.



SHORT DURATION

For investors interested in a shorter maturity profile which targets an allocation of 50% Investment Grade and 50% High Yield securities in one portfolio.

BROAD MARKET

Combines the Investment Grade and High Yield strategies in an approximate 2/3 – 1/3 blend. It is designed for the investor who desires to achieve greater returns than the Investment Grade strategy while incurring less volatility than the High Yield strategy.

SHORT DURATION : INVESTMENT GRADE

Designed for investors interested in a shorter maturity profile but do not wish to hold any non-investment grade securities. The average maturity of the portfolio, once seasoned, is less than half of that of our core Investment Grade strategy.

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