

# Fundamental Portfolios for Logical Investiti



# Articles & Educational Material



## The New 60/40 Portfolio

PDF by [Stone Ridge Funds](#) about investors adopting a fundamentally new mindset about investing.



## Dimensional Fund Advisors Overview

Explains how [Dimensional Fund Advisors](#) puts financial science to work for you.



## A Different Way to Invest

This PDF presentation answers key questions many investors ask and highlights [Dimensional's](#) research-based approach to investing.



## DFA Matrix Book 2019

For more than 30 years, [Dimensional's](#) clients have relied on the Matrix Book to look beyond short-term market fluctuations and shed light on the dimensions that explain differences in returns.



## Advisor's Alpha

[Vanguard](#) research has produced a whitepaper on how an advisor can add value to a client. This is part of a series of research available from Vanguard known as Advisor's Alpha, created in 2001. They believe an advisor can add value, and now they have quantified that to be about 3%.



## Investor Discipline

Graphical representation of how missing the best days of the market could affect a portfolio's return.



## Connecting the Dots

Article by Jim Parker, Vice President, [Dimensional Fund Advisors](#)



## FPLCM Brochure

Learn more about FPL Capital Management

## Downturns and Recoveries



The stock market moves in cycles with periods of contractions followed by periods of expansion. Click to read more on how stocks have performed during those periods. (Data provided by Morningstar)



## Global Investing

Slides portray the performance of global markets over the past few years, and how one can benefit from a globally diversified portfolio. (Data provided by Morningstar)



## An Interview with a Fee-Only Planner

An Interview with FPL Capital Management CEO, [Michael George](#) (by Jim Dahle of WhiteCoatInvestor.com)



## DFA Founder Wins by Thinking Small-Cap

Article by Investment News Magazine



## The US Mutual Fund Landscape

2019 Report documents survivorship and performance in the US mutual fund industry and illustrates the impact of high fees and turnover on returns.



## Is There Predictive Power in Morningstar Ratings?

Graphs explain the relationship between Morningstar ratings and fund performance.



2019 First Quarter Market Review



2018 Fourth Quarter Market Review

2018 Third Quarter Market Review



## Managing Portfolios for Clients Nationwide



