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A Family Owned Firm

Bryden-Abrams Investment Management LLC is a family-owned investment management business, not a subsidiary of any other institution. Our clients are typically individuals or family groups who have accumulated substantial wealth through their businesses, professions or inheritance, and, lacking either the time, the interest or the expertise, have entrusted us to manage portfolios of equities and bonds in order to preserve their capital and to earn a reasonable return, while carefully controlling overall risk. Each portfolio is carefully tailored to reflect the specific requirements and risk profile of the particular client.

We are a large to mid-cap value manager, attempting to outperform the S&P 500 on a consistent basis while assuming less risk than the index as a whole. We are by no means “closet indexers,” and the degree of diversification in our portfolios is strictly a function of the number of good ideas that we develop. We look for big top down themes and try to find good exposure via reasonably valued companies that prove they can execute. A major share of a large and growing addressable market, high return on equity and rising incremental profit margins are among our key evaluation metrics. We try to avoid value traps, and we don’t try to “catch falling knives.” Most of our current positions reflect big themes such as airlines, financial services, healthcare, social-networking and corporate productivity enhancement, but there are always some opportunistic plays. Our emphasis is on companies that have a clearly defined 3-5 year growth strategy.

The fee for a fixed income portfolio is (0.60%) 60 basis points per year times the total assets under management, billed quarterly in advance. Our annual fee for an equity portfolio is 1.25% of the assets under management. We have fairly consistently outperformed the S&P 500 Index, and our turnover is quite low, so most of our gains are taxed as long term capital gains.

Performance results and references will be provided to serious prospects upon request.

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