



Triad Investment Management is an SEC-registered investment adviser based in Newport Beach, California. Not all investment advisers are the same. We founded Triad on three principles:

RESEARCH We do our own, independent thinking. We develop investment recommendations for client portfolios based on our own research – not Wall Street’s. We buy individual securities, and we avoid ETFs, index funds and hedge funds.

BEHAVIOR We are value investors that seek to benefit from the irrationality of the market. We buy when we believe the price of a security is discounted from our estimate of business value. It takes both discipline and strength to ignore “the herd.”

ETHICS Ethical conduct is our foundation. We are fiduciaries, period. We do not sell insurance, annuities or other financial products. We believe in “eating our own cooking” by investing alongside our clients in generally the same securities.

To learn more, [click here](#).

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