



The Foundation is in the Process

Our Selective Process is designed for excellence. We believe in concentrating on our best ideas, building a portfolio of high quality companies and owning those businesses for long periods of time.

Our approach is evidenced by our results.



(/long-only)

LONG ONLY (/LONG-ONLY)

Selective takes positions in Selective Companies through three types of long positions: straight stock purchases, covered calls, or call options.



(/process)

FOCUS ON QUALITY (/PROCESS)

We focus on purchasing Selective Companies that we believe provide enduring products and services with durable competitive advantages.



(/high-conviction)

HIGH CONVICTION (/HIGH-CONVICTION)

We concentrate our portfolio on 15 to 25 companies, differing significantly from a passively managed index.



(/low-turnover)

LOW TURNOVER (/LOW-TURNOVER)

The investment philosophy is built on a deep and thorough understanding of companies and owning them for long periods of time.

Results that are Different

AVERAGE ANNUAL RETURNS IN EXCESS OF 13% SINCE INCEPTION
OUTPERFORMED THE MARKET, AFTER FEES IN 4 OUT OF 6 YEARS

SELECTIVE^{*}
+111.2%

S&P 500^{**}
+86.6%

+8.2%	2018	(4.4%)
+16.9%	2017	+21.8%
+18.6%	2016	+12.0%
+5.8%	2015	+1.4%
(4.4%)	2014	+13.7%
+39.2%	2013 [†]	+24.2%

[Read disclosures here](#)

[LEARN MORE \(/DUE-DILIGENCE\)](#)





Ranked No. 1 on SumZero

The world's largest community of investment professionals ranks Selective Wealth Management as #1 in the *Growth at a Reasonable Price* category.¹

¹based on SumZero ranking as of November 2017.

High level performance without the fees



FEEs THAT ARE **ACTUALLY**
ALIGNED WITH CLIENTS

NO PERFORMANCE FEE

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