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Broad Run manages equity portfolios for institutional clients using a common sense investment approach that seeks long-term capital appreciation with downside protection.

Firm Overview

Broad Run is a SEC registered investment adviser located in Arlington, Virginia. The firm manages equity portfolios for institutional and individual investors through separate accounts and a sub-advised mutual fund. Client assets under management were \$2.4 billion (as of March 31, 2019).

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Our Approach

We manage concentrated, low-turnover portfolios of what we believe to be high quality, well run businesses with attractive growth prospects. Our risk control efforts focus on trying to protect against the permanent loss of capital by seeking to own fundamentally sound businesses trading at modest valuations.

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Investment Process

Our approach requires only a few new investments per year, so we can be highly selective and conduct rigorous research on each prospect. We use SEC filings, management meetings, site visits, and financial modeling, among other inputs, to determine if a prospect meets our investment criteria.

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