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Henry James

International Management

"Don't mind anything that any one tells you about any one else. Judge every one and everything for yourself." (1843-1916)

— *Henry James: The Portrait of a Lady*

Welcome

Henry James International Management, Inc. provides specialized strategies for international, global, and foreign investments. Our strategies focus on selecting globally based investment instruments as part of a diversified portfolio. Such diversified portfolios strive to minimize risk by investing among foreign companies and markets. Our investments endeavor to emphasize growth in developed and emerging markets. The firm currently manages over \$700m in AUM.

Our Chief Investment Officer, James O'Leary (CFA), has over 30 years experience in the investment management arena and has been managing International portfolios since 1999.

Performance

Investment Philosophy

Henry James International Management understands that growth is global. Our investment strategies strive to control risk and to maximize growth through our actively managed investments in international, global, and foreign markets.

Please note: Investment in equity strategies involves substantial risk and has the potential for partial or complete loss of funds invested. Past performance is no guarantee of future results.

[First Quarter Performance Data \(resources/Performance/jim_table-Q1-2019.pdf\)](#)

Henry James International Management is a boutique international equity manager with an entrepreneurial spirit. We follow a high-conviction investment philosophy that combines a bottom-up quantitative and fundamental analysis system with a top-down risk mitigating country allocation system. This system along with a targeted beta can provide downside protection. Recognizing the importance of downside protection, we target each product's beta to the market's risk profile.

The bottom-up stock selection process starts with identifying the best candidates with a Risk Reward Ratio, followed by an adaptive model that points to the fundamentals that do best in the current market environment followed by intense analysis prior to inclusion in the portfolio.

The final step overlays our top down risk mitigating country allocation approach seeking to overweight countries whose current natural competitive advantages, along with their economic and political conditions, are reflected in a highly ranked stock market reward/risk ratio.

The combined bottom-up stock picking system and top-down country ranking scheme result in a lower turnover portfolio that over-weights higher ranked, fundamentally strong stocks and countries that are positioned for stock appreciation.

Products

Henry James International Portfolio

The Henry James International Portfolio is a large capitalization international portfolio; it takes advantage of the international economy while seeking long-term capital appreciation. The investment process is an objective, bottom-up, quantitative screening process designed to identify and select inefficiently priced international stocks with superior return versus risk characteristics. This is combined with quarterly, top-down risk mitigating country allocation system rebalancing, in which the management team over weights highly ranked countries and under weights lower ranked countries. Typically, the portfolio invests in 50 to 70 stocks that pass our disciplined fundamental and quantitative criteria. The primary performance benchmark is the MSCI-EAFE.

Henry James International Select Portfolio

The Henry James International Select Portfolio, is a high conviction SMID Capitalization, at purchase, international core portfolio. The investment process is an objective, bottom-up, quantitative screening process designed to identify and select inefficiently priced international stocks, under \$10 billion, with superior return versus risk characteristics. This is combined with quarterly, top-down risk mitigating country allocation system rebalancing, in which the management team over weights highly ranked countries and under weights lower ranked countries. Typically, the portfolio invests in 50 to 70 stocks that pass our disciplined fundamental and quantitative criteria and we let our winners run. The primary performance benchmark is the MSCI-EAFE.

Henry James Emerging Markets Portfolio

The investment process is an objective, bottom-up, quantitative screening process designed to identify and select inefficiently priced international stocks, with superior return versus risk characteristics. This is combined with quarterly, top-down risk mitigating country allocation system rebalancing, in which the agreement team over weights highly ranked countries and under weights lower ranked countries. Typically, the portfolio invests in 50 to 70 stocks that pass our disciplined fundamental and quantitative criteria and we let our winners run. The primary performance benchmark is the MSCI Emerging Markets Index.

Henry James International ESG Portfolio

The Henry James International ESG Portfolio, started in August 2008, is designed to achieve the highest possible returns, while applying an ESG overlay for social guidance. Our objective, bottom-up, quantitative investment process identifies and selects inefficiently

priced international stocks with superior return versus risk characteristics. This is combined with quarterly, top-down country rebalancing for which the management team over weights highly ranked countries and under weights lower ranked countries. The ESG portfolio is invested in a socially responsible manner in relation to Environmental, Social and Governance. Typically, the portfolio invests in 50 to 70 stocks that pass our disciplined fundamental and quantitative criteria. The primary performance benchmark is the MSCI-EAFE index.

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