

STRATEGIC FIXED INCOME

ABOUT US

Piton specializes in designing and managing tailored fixed income separately managed accounts for institutions, RIAs, and high net-worth individuals. We leverage our extensive experience and market access for the benefit of our clients.

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THE TEAM

Our team has an extensive history of managing fixed income assets and vehicles through decades of varying interest rate environments. We aim to provide dedicated service to our clients and to deliver them the access and performance they deserve.

SERVICES

Our strategies and services span across the largest taxable and tax-exempt sectors of the fixed income market; US Treasuries & Agencies, Government backed MBS, Corporate and Municipal bonds.

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FIXED INCOME ASSET MANAGEMENT

Piton offers customized fixed income asset management. We work with each individual client to understand their specific investment objectives, liquidity preferences and risk parameters to tailor a portfolio to meet their goals. We carefully review tax objectives, asset class specifications, maturity and duration profiles and credit exposure of each mandate to achieve targets for our client.

Primary Investment Objective	Piton Fixed Income Strategy
Preservation of Principle & Liquidity	Piton Tactical Government Cash Strategy
	Piton Tactical Ultra-Short Duration Strategy
	Piton Tax-Exempt Tactical Ultra-Short Duration Strategy
Conservative Total Return & Broad Fixed Income Exposure	Piton Taxable Short Duration Strategy
	Piton Taxable Intermediate Duration Strategy

	Piton Taxable Core Strategy
Tax-Exempt Exposure	Piton Tax-Exempt Short-Term Strategy
	Piton Tax-Exempt Intermediate Strategy
	Piton Tax-Exempt Core Strategy
Yield Focus	Piton Taxable Managed Yield Strategy
Asset Class Specification	Piton GNMA Short-Intermediate Strategy
	Piton Structured Note Income Strategy

TEAM

James Fortescue

Mr. Fortescue is a founding partner of Piton and serves as the Chief Executive Officer. He has twenty-two years of experience building, operating and managing companies, investment portfolios and relationships in the financial services space. Prior to founding Piton, Mr. Fortescue most recently

Kristopher Konrad

Mr. Konrad is a founding partner of Piton and serves as the Chief Investment Officer. He has extensive experience managing capital in the Agency Mortgage-Backed Securities Market for twenty years, through multiple interest rate environments. Mr. Konrad has managed one of the largest levered Agency

Brian Lockwood, CFA

Mr. Lockwood serves as the Head of Fixed Income of Piton. He has over twenty years experience managing Fixed Income portfolios. Prior to joining Piton, Mr. Lockwood was a Senior Portfolio Manager of the Fixed Income in the Private



served as the Chief Operating
Officer at...

MBS portfolios outside of
Fannie...

Group, Americas at HSBC.
There, he...

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CONTACT US

DON'T HESITATE TO GET IN TOUCH WITH US.

WE LOOK FORWARD TO THE OPPORTUNITY TO BECOME YOUR TRUSTED ADVISOR.

Phone: 646-518-2800
Email: info@pitonim.com

777 Third Avenue
New York, NY 10017



Disclosures

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**Providing tailored, institutional
quality fixed income asset
management to our clients**

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