



“Our focus at RBO is to partner with clients as their investment manager and to preserve and grow their wealth through the consistent application of a disciplined investment methodology.” – Jack Oliver, Managing Director

## About RBO

RBO is an investment manager serving individuals, family offices, and institutions. We specialize in acquiring equity positions in public companies with significant advantages, exceptional leadership, and that we believe are significantly undervalued. Our dedication to long-term relationships and thoughtful approach have allowed us to protect and grow client capital for more than three decades.

As an independent Investment Advisor, we follow a commitment to honor and serve our clients, strive to be a symbol of integrity in the industry, and hold ourselves accountable to the highest measures of transparency. Our dedication to providing superior results for our clients has never wavered.

## Key Elements of RBO's Investment Approach

## **INDEPENDENT RESEARCH**

Independent research is the foundation of our investment approach and we believe a key differentiator from our peers. We believe in senior management teams as well as the importance of analyzing competitors, customers, and s

## **CONCENTRATED PORTFOLIOS**

Diversification is important and we believe it can be effectively achieved by owning 20-30 companies across industries and geographi we invest only in our highest conviction ideas.

## **LONG-TERM PERSPECTIVE**

We believe the market frequently misprices stocks due to misinterpretation, inattention, emotion, and a short-term outlook. Beca differently from the crowd and use these opportunities to purchase businesses at attractive val

## **GLOBAL EXPOSURE**

Our portfolios are not bound by geographic constraints. We generally believe that we achieve international exposure by owning dome United States.

## **MINIMIZED COSTS**

Since we view stocks as ownership stakes in businesses, we do not trade frequently in an attempt to generate short-term gains. By tra costs, two of the most common pitfalls of active managers.

## **RISK MANAGEMENT**

We define risk as a permanent loss of capital and not by market volatility. We assess risk from both a qualitative and quantitative view time, believing the best risk management method is by individual company analysis.

## Disclosure

All investment has the risk of loss; there can be no guarantees of future returns or asset growth. Past performance is not indicative of future performance. Investments and the income derived from investments can go down as well as up. It shall not be assumed that the performance of securities or that recommendations made in the future will be profitable or will equal the performance of any securities mentioned here. While the portfolio which reflects appropriate risk and return features, portfolio characteristics may deviate from those of relevant benchmarks for informational purposes only. Before engaging RBO, prospective clients are strongly urged to perform additional due diligence, to ask questions appropriate and to discuss any prospective investment with their legal and tax advisers.

1478 Railroad Avenue, Saint Helena, CA 94574 • (707) 963-1231

©Copyright RBO & Co., LLC. All Rights Reserved. Website by Invictus Local.

[Terms of Use](#) • [Privacy Policy](#)