



♦ The key to investment success is discipline.
♦ Over time, common stocks deliver the highest rate of return; over time, the Value style of investing outperforms the Growth style, but both should be represented in the overall portfolio.



The Growth & Value Approach

Four mainstream investment strategies constitute the Growth & Value Approach, and there are three common threads among them:

- 1) All are quantitative and highly disciplined
- 2) All involve large capitalization equities
- 3) All employ the contrasting Growth and Value investment styles in the same portfolio

How did we develop our strategies? Slowly, carefully, and with certain objectives in mind. Our flagship, [Growth & Value 20](#), was developed for the equity investor interested in a Core approach to serve at the heart of his or her overall portfolio. [Growth & Value 20 Balanced](#), on the other hand, was developed for the investor interested in a combination of our flagship equity strategy and the stability provided by Treasuries.



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The Growth & Value 20 Portfolio



The Growth & Value 20 Balanced Portfolio



And, the work didn't stop. The flagship's two performance drivers, the five-stock Momentum Group (Growth) and the five-stock Contrarian Group (Value), came together in [Growth & Value 10](#), a Concentrated Core approach. The objectives here are consistently superior returns and maximum upside participation. Finally, [Index Plus](#) is a Core-Satellite approach in which [Growth & Value 10](#) governs 25% of total assets, and the remaining 75% is invested in an S&P 500 index fund. The benefits/objectives: returns superior to and highly correlated with those of the Index, very low transaction costs, very low management fees.

The Growth & Value 10 Portfolio



Index Plus



How have these Nottingham strategies performed? Very well in the cases of [Growth & Value 20](#) and [Growth &](#)

[Value 20 Balanced](#), and so far, so good with respect to the newer [Growth & Value 10](#) and [Index Plus](#). We encourage you to review the data to follow, as well as the accompanying disclosure language. Performance, as we say, is the best evidence of past success and a powerful predictor of future success.

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