



INVESTMENT MANAGEMENT SUCCESS

Who? Lynch – Neff – Buffett – Grantham – Templeton

What? Are the common characteristics:

- Do not report on the basis of, or have time for – short term performance.
- Fundamental original individual company research (no technical; indexing; modern portfolio theory; sector rotation; momentum).
- Consistent methodology.
- Investors; not stock market players.
- Love the business, work very hard but have a balanced life, e.g. Lynch: history, golf, bridge, family.
- Listen with an open mind – apply common sense / simplify.
- Little attention, if any, to economists or macro-based strategists.

Result? Each gentleman is rich. Their clients / investors are also rich!

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