BAM SMIF
INVESTMENT PHILOSOPHY

BAM SMIF strives to maximize risk-adjusted returns for our clients while keeping their objectives and expectations at the core of our investment decisions.

Our investment decisions are driven by fundamental research to build long-term wealth for our clients. The portfolio construction and management processes are positively impacted by a diverse team that provides multiple perspectives.

All decisions will undergo a rigorous analytical process. We will remain adaptive with our portfolio to accommodate fluctuating market conditions.

We believe markets are efficient in the long-term but short-term inefficiencies do occur. By utilizing an active management approach, we can capitalize on those opportunities to add additional value for our client.

Our approach will balance risk and reward with a conservative inclination. Overall, the Student Managed Investment Fund will embody Cal Poly Pomona’s “Learn by Doing” philosophy.

We will continue to evolve our program at CPP, building upon guidance and contributions from our SMIF alumni.

BAM SMIF will operate with competence, diligence, and in an ethical manner, by placing the interest of the client before our own.