

Convergence Investment Partners – Quantitative Investing



Convergence Investment Partners is based in Mequon, Wisconsin and uses quantitative tools to select investments, construct portfolios, and manage risk. At Convergence, we believe that the equity markets are inherently efficient because market participants collect all available data and stock prices reflect the collective wisdom of all investors. Notwithstanding this opinion, we also believe that there are two exploitable opportunity sets.

The first exploitable tendency is that while all information is available to everyone, the ability of most investors to quickly and efficiently assimilate vast quantities of data and apply it to the decision process is severely limited. We believe our quantitative processes greatly improve our ability to collect, assimilate, and apply a staggering amount of data to the investment decision process.

The second exploitable tendency in the market is that investors collect and evaluate not only quantitative data, but also qualitative data. Qualitative data includes built-in investor bias' and variables related to behavioral tendencies. We believe quantitative modeling for investment decision-making can exploit these two variables.

Strategies Offered: Strategic Active Tax Management, Dividend Growth, Unbiased Enhanced Indexing, Core Plus (Long/Short)

from  Montage Investments

Driven by Independence



Recommending investments to clients requires more knowledge and expertise than ever. And keeping up with a changing investment universe isn't easy.

In such an environment, which shows no sign of abating, we think clients are well served by a best-of-breed approach to money manager selection. History has shown that no one investment manager, no matter how large, no matter how global, no matter how excellent a single product offering, can be all things to all advisors and investors. So we think that a well-defined selection process that focuses only on the best of the best in each asset class and style is essential for success.

Montage brings together world-class, institutional investment managers – each offering a distinct approach to asset management that reflects many decades of professional experience and proprietary investment strategies across global asset classes. Our organizational approach is to allow individual investment managers to retain boutique processes, talent and culture that have proven records of adding value to portfolios and meeting client objectives.

Today, we manage over \$8 billion, while retaining organizational uniqueness and flexibility, allowing our investment managers to focus on what they do best.

- Our portfolio managers average over 20 years of investment experience.
- Our leadership has spent all of their careers managing money at leading fund families, banks, brokerage firms and hedge funds. They've learned first-hand how to meet challenges that can affect a company's ability to serve clients.
- Each investment manager has an independent, well-defined investment process and portfolio management discipline.
- Our organization has operations nationwide, and offers a virtual network of the best investment talent available in an effort to avoid the biases of any geography.

Talk to your advisor or investment consultant today about how our solutions can work within many long-term investment strategies to meet a wide variety of investment goals.

