



## Designed with the Private Client in Mind

### **Barometer Capital Management Inc.**

Barometer Capital Management manages investment portfolios for private investors, foundations and endowments. Barometer's partners began working together in 2001 and in 2006, the business became Barometer Capital Management through a management buyout. Today, Barometer remains an independently-owned firm with approximately 40+ employees that manages money for over 450 families. The firm's assets have grown to approximately \$2.0 billion under management\*.

### **The Partners**

The partners created Barometer to offer investment services suited to the unique objectives of the private investor. As opposed to traditional institutional investment companies that measure success with relative returns, Barometer provides private investors strategies aimed at generating a return above zero, while focusing on preservation of capital.

### **Our Approach**

Barometer's Disciplined Leadership Approach™ is an active, style agnostic process focused on understanding the current market environment. The Approach combines a top-down market and sector risk assessment model with a bottom-up quantitative security selection process – Barometer's team focuses on identifying trends in the marketplace, concentrating the portfolios in those areas for as long as those trends remain positive and repositioning them in a timely manner as new opportunities emerge. Our continuous evaluation of portfolio holdings, along with our willingness to hold significant cash

positions in the absence of market leadership, supports our philosophy of providing investors with absolute returns.

The Disciplined Leadership Approach™ also places particular emphasis on protection of capital. In the event that risk is elevated in portfolios, Barometer plays defence and protects the capital that clients have worked so hard to accumulate. By monitoring for change every day, applying a disciplined selling strategy and making tactical use of cash equivalents, we protect portfolios from staying invested in unproductive assets or during pervasive market weakness. Barometer's Selling Strategy adheres to the consistent use and reset of stop/loss alerts – clear exit prices for every security – designed to eliminate the rationalization and emotion from the sell decision.

Barometer prides itself on transparency of process and excellence in compliance standards. To this end, Barometer provides its clients with regular communication about portfolio holdings, investment results, and significant market events. The firm has an entirely open and transparent process.

Barometer is pleased to share its Disciplined Leadership Approach™ with you.

*\*Assets under management includes separately managed client accounts, Barometer Private Pools, the Barometer Group of Funds and investment advisory services to broker/dealers via an investment management platform as at March 31, 2018.*

[www.barometercapital.ca](http://www.barometercapital.ca)