Fundamental Strategies

Description

Fundamental strategies focus on long-term investing aimed at achieving absolute returns with lower volatility over a full market cycle. The primary objective is to deliver a low-cost portfolio that combines strategic, longer-term themes with short-term tactical opportunities. These strategies are designed for institutional and retail clients looking for actively managed portfolios.

Dan Timotic, CFA
Managing Principal &
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Prior to founding T2 Asset Management, Dan held various positions at some of the largest investment firms in the country as a trader, portfolio manager, and strategist. With nearly 25 years of professional experience, he has managed billions of dollars for institutions, endowments, foundations, pension plans and individuals.

Dan received his MBA in Finance from DePaul University. He is a Chartered Financial Analyst and a member of CFA Institute as well as CFA Society of Chicago.

Investment Philosophy

Absolute Return & Risk Management

We believe in the fundamental principles of strong diversification, low-cost investing, and that markets are best navigated with the avoidance of large losses.

Research & Discipline

We follow a rigorous and disciplined investment management process that provides a structured approach to capture gains during rising markets while reducing risk when circumstances change.

Investment Process

Core Macroeconomic Themes

We begin with a top-down global macroeconomic analysis including, but not limited to, fiscal policy, monetary policy, employment and earnings growth to gives us a more complete global picture of the investment landscape.

Strategic Investing with Tactical Allocations

Market conditions often change. By combining the flexibility of tactical positioning with strategic thinking, we can better manage risk.

Targeted Allocations

- ***T2 Core Equity:***
  80% to 100% Equity
- ***T2 Flexible Growth:***
  60% to 80% Equity
- ***T2 Conservative Growth:***
  40% to 60% Equity