

Public Equities

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We thoughtfully manage public equity portfolios to maximize tax efficiency. We harvest short-term and long-term portfolio losses and use them to offset both short-term and long-term gains.

Our portfolios are generally a blend of both passive and active strategies. We are generally passive in areas that we view as efficient (like large cap US equities) and more active in areas that we view as inefficient (like China). By using a combination of both strategies, we have the opportunity to outperform defined benchmarks while still being mindful of cost and tax efficiencies.

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