

*Proprietary analytical models,  
designed for fixed-income portfolio  
management, that help clients achieve  
their specific investment goals.*



PORTFOLIO STRATEGY GROUP



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# PORTFOLIO STRATEGY GROUP



## Customized analytics designed to maximize your returns

At Stone & Youngberg, we believe that truly great investment strategies can't come from a "one-size-fits-all" mentality. That's why we treat each of our institutional fixed income clients as individuals with their own unique sets of goals. To deliver on this philosophy, our Portfolio Strategy Group utilizes proprietary analytical models — tailored to reflect the specific characteristics of each client's portfolio — to provide targeted, customized recommendations that help maximize returns.

## Gain powerful insights into your portfolio management

Stone & Youngberg's Portfolio Strategy Group starts its evaluation with a thorough Fixed Income Portfolio Analysis and Strategy Review. We use a comprehensive set of analytics to identify and isolate the portfolio's specific performance attributes, pinpoint potential areas of risk, and formulate strategy alternatives. In addition, our portfolio managers utilize our Cash Flow Simulation Reports to look at the portfolio's monthly, quarterly, and annual cash flow under different interest rate scenarios.

## Portfolio monitoring that goes far beyond the benchmark

At Stone & Youngberg, our Portfolio Strategy Group monitors our clients' portfolios against a client-specified index. We have access to more than 200 fixed income indices in our database. Our Portfolio vs. Index Report looks at the distribution characteristics and total return performance of your portfolio under different interest rates. In addition, we evaluate potential transactions relative to a specific benchmark using our Portfolio & Swapped Portfolio Report vs. Index Report. This allows portfolio managers to see how a proposed transaction will affect portfolio performance and how this "swapped" portfolio will stack up against a particular index.



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*Our unique approach allows portfolio managers to understand how a proposed transaction will affect performance, so you can make the most informed decision possible.*

## More help for making the right investment decisions

To help you make the best investment decisions possible, Stone & Youngberg offers many other quantitative analyses, including:

- ▶ *Transaction Analysis – Buy vs Sell evaluation as well as the impact on portfolio metrics*
- ▶ *Portfolio Sensitivity Analysis – Including user specified yield curve scenarios*
- ▶ *Performance Attribution*
- ▶ *Total Return Optimization*