



# The Investment Products

*Portfolio Effect is a crude substitute for knowledge – Marty Whitman*



## Lupoff Concentrate

- High Conviction Investments
- 5-12 Investment Positions
- Deep Research Dive to Harness Best “Bottom Up” Returns
- Anticipated Catalyst
- Lupoff’s Noted *BRACE* Methodology
- No Management Fee, No Performance Fees unless 5% Return to Client-Partner
- Seeking High Absolute Returns

# LUPOFF

## FRIENDS AND FAMILY INTERESTS

# + Investment Philosophy – *Lupoff Concentrate*

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- I utilize my BRACE Methodology to identify and invest in a narrow portfolio of opportunities
- We both shall invest in my chosen liquid, long and short positions absent the “noise” in the markets and/or the shackling of investment structure, such as faced when operating a mutual fund or a hedge fund
  - We harness *Time Arbitrage*, an ability to buy when others are fearful and sell when others are greedy, without worries about day-to-day prices
  - I will intimately know these few investments – the companies, managements, other investors, risks, and plausible events impacting value



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