

## **Introducing Sequoia**



LIKE ITS NAMESAKE TREE, OUR SEQUOIA PORTFOLIO HAS GROWTH POTENTIAL BUILT INTO ITS DNA. This offering seeks to outperform the S&P 500, net of fees, over every rolling three-year period.

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## **Benefits that Stand Tall:**

- Sequoia owns **large, stable companies** so it does not take huge risks to deliver outsized returns.
- Companies are chosen for their **competitive advantages** that give them larger growth opportunities.
- Sequoia companies have earnings and price **momentum**, so your money goes where the growth is.
- Sequoia rebalances its holdings **every quarter**, letting your funds ride the same wave as the world's largest investors.
- Sequoia only owns twenty stocks. The more **focused** your portfolio, the better chance you have of outperforming the market.

## Who is Sequoia for?

SEQUOIA IS DCM'S MOST GROWTH-FOCUSED STRATEGY. Emphasizing innovation and growth, it has been designed for funds you will not need for current living expenses:

- A Sequoia portfolio could grow your kids' inheritance.
- It should also work well in the long run by building your retirement nest egg.



#### **E** Rooted in Sound Strategy

UNLIKE OTHER DCM PORTFOLIOS, SEQUOIA WILL NOT BE REQUIRED TO OWN DIVIDEND-PAYING COMPANIES. Its universe includes every stock traded on U.S. exchanges.

As any arborist will tell you, pruning encourages proper growth. DCM's proprietary algorithm chooses the twenty most promising companies for Sequoia from the fifty that large investment funds favor.

6,000 stocks on U.S. exchanges

Institutional investors' highest conviction 50 holdings

DCM's proprietary algorithm

Top 20 stocks

Sequoia



#### A Landscape of Opportunity

E SEQUOIA Our most growth-focused strategy. One that seeks to beat the market, based on growth, innovation and risk.

**E CAPITAL BUILDER** 

**GROWTH** 

CORNERSTONE

**ENDOWMENT CORNERSTONE** 

INCOME BUILDER

→ INCOME >

While Sequoia lives at the upper echelon of our growth offerings, there is also a full panorama of DCM portfolios designed to fit any specfic need and risk tolerance.

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