

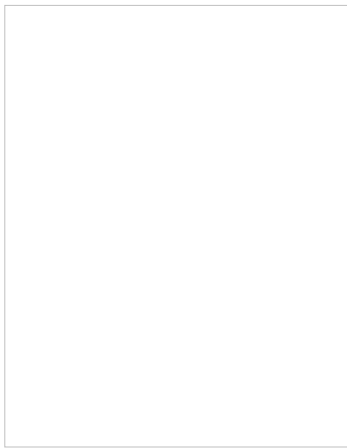
Insights

A unique approach to small-cap investing

Combining a bottom-up and top-down strategy for long-term success

Most active investing entails bottom-up, fundamental analysis. By analyzing valuation metrics and financial statements, investors try to determine what to buy, what to sell and when. However, when investors use similar processes, they may produce strikingly similar blind spots when external influences are not considered. We believe the ability to incorporate exogenous factors into one's decision making is what differentiates the thousands of average investors from the few great ones.

The Mesirow Equity Management team features an additional layer of analysis that augments our fundamental assessments of companies: We incorporate top-down, thematic considerations in a way that we believe distinguishes us from most other small cap equity investors. In our view, it's what helps us make outstanding decisions designed to deliver long term success.



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