

Credit Suisse Asset Management Capital Discipline Strategies

Founded in 1856, Credit Suisse is a leading global wealth manager headquartered in Zurich, Switzerland, with operations in over 50 countries. Credit Suisse Asset Management (CSAM) manages over USD\$325 billion in assets globally across a variety of alternative and traditional strategies and products, primarily for institutional investors focused on high net worth clients.

Capital Discipline Investment Style

The CSAM Capital Discipline investment team manages concentrated, low-turnover, high active share equity portfolios within two distinct investment strategies: Sustainable Growth and Sustainable Dividend.

Sustainable Growth Portfolios seek to offer superior risk-adjusted returns relative to the benchmark, with a focus on high quality, blue chip companies with strong economic profit growth, trading at a discount to their perceived intrinsic value. Sustainable Growth Portfolios available through CGWM include:

- US Blue Chip Opportunities
- Canadian Equity

Sustainable Dividend Portfolios seek to offer current income and income growth, as well as capital appreciation with less risk than the broader equity market. Sustainable Dividend Portfolios available through CGWM include:

- Global Sustainable Dividend
- US Sustainable Dividend

Capital Discipline Investment Team

Christian Stauss, Co-Portfolio Manager



Christian is a co-Portfolio Manager across the HOLT Capital Discipline strategies. He has been engaged in the asset management industry for 20 years. Christian joined

Credit Suisse Asset Management in 2012 from ROK Capital, where he was a Co-Founder and Chief Investment Officer. Prior to that, he spent five years at Tremblant Capital where he was a Managing Director investing in long/short equity strategies. Christian began his asset management career at Fidelity Investments in London, where he managed a Global Technology fund and a European Financials fund. He holds a BA in Economics from Dartmouth College and a MBA from The University of Pennsylvania Wharton School.

Heather Kidde, Co-Portfolio Manager



Heather is a co-Portfolio Manager across the HOLT Capital Discipline strategies. Previously, she was a Senior Analyst focused on fundamental company analysis. Prior

to joining the team, she was a HOLT Sector Specialist covering the Energy & Materials Sectors. Heather joined Credit Suisse HOLT in 2010 after spending 3 years in the Private Banking division. Heather is a CFA charterholder and an active member of the CFA Institute and the New York Society of Security Analysts (NYSSA). She holds a BA in Economics and Psychology from Colgate University.

Sean Burns, Co-Portfolio Manager



Sean is a co-Portfolio Manager of the HOLT Capital Discipline Sustainable Growth strategies. Sean originally joined the team in 2014 as a Research Analyst

focused on fundamental company analysis and portfolio risk management. He was formerly a member of Credit Suisse HOLT's Investment Strategy group. Sean holds a BBA with a concentration in Finance from Northeastern University.

Todd Leigh, Senior Advisor



Todd is Head of the HOLT Active Equity Group and a Senior Advisor to the HOLT Capital Discipline investment committee.

Todd has been involved in investment banking and asset management for more than 20 years. He returned to Credit Suisse in 2012 from ROK Capital, where he was a Co-Founder and Director of Research. Prior to that, he spent three years at Relational Investors where he was a Managing Director and Partner in the investment management team. Todd's earlier career at Credit Suisse spanned many roles and regions in the Investment Bank with his last role as a Managing Director in the Technology Investment Banking Group. Todd holds a BS in Commerce with a concentration in Accounting from the University of Virginia and is a CFA charterholder.