

# Low Volatility Investing

## Investment Strategies to Minimize Volatility

Tiburon Written Research  
May 28, 2020



**TIBURON STRATEGIC ADVISORS**

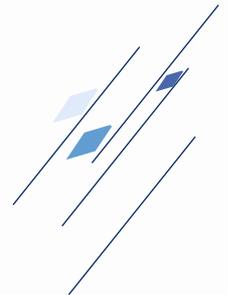
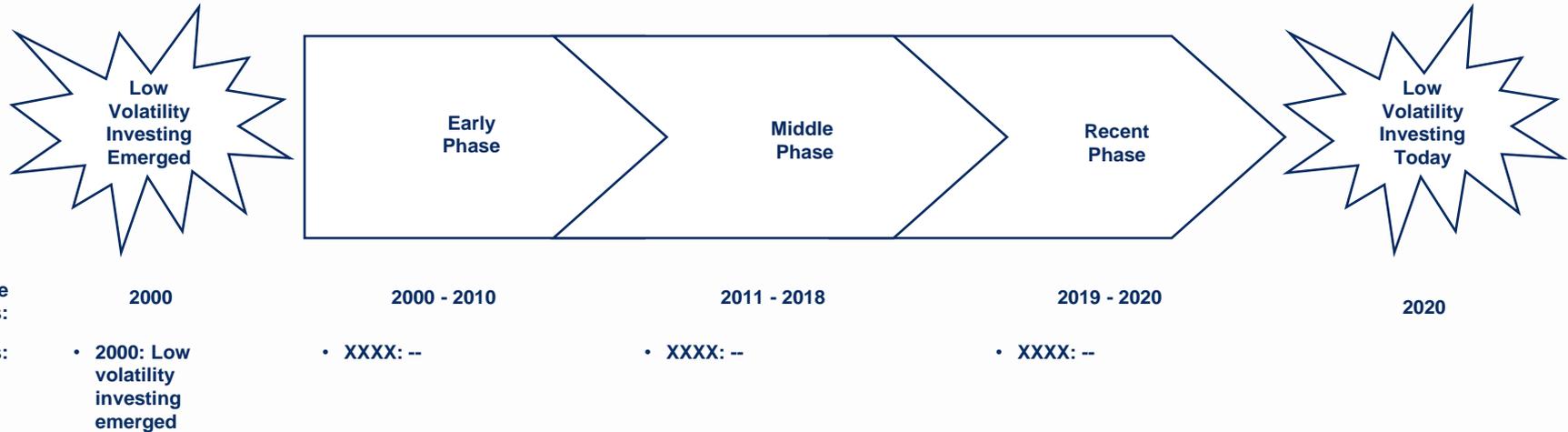
Industry Leading Think Tank, Advisor, and Investor in  
Wealth & Investment Management (and Related WealthTech) Firms

- **Low Volatility Investing Market Evolution**
  - **Market History**
  - **Market Growth**
  - **Low Volatility Investing Leading Firms**
- **Market Segments**
  - **Packaged Products**
    - ❖ **Open-End Mutual Funds**
    - ❖ **Exchange Traded Funds (ETFs)**
  - **Separately Managed Accounts (SMAs)**
- **Low Volatility Investing Future Predictions**
  - **Moderate Growth in Low Volatility Investing**
  - **Fastest Growth in Low Volatility Investing Exchange Traded Funds (ETFs)**



# Low Volatility Investing Emerged Around 2000 and Has Subsequently Evolved through its Early, Middle, & Recent Phases

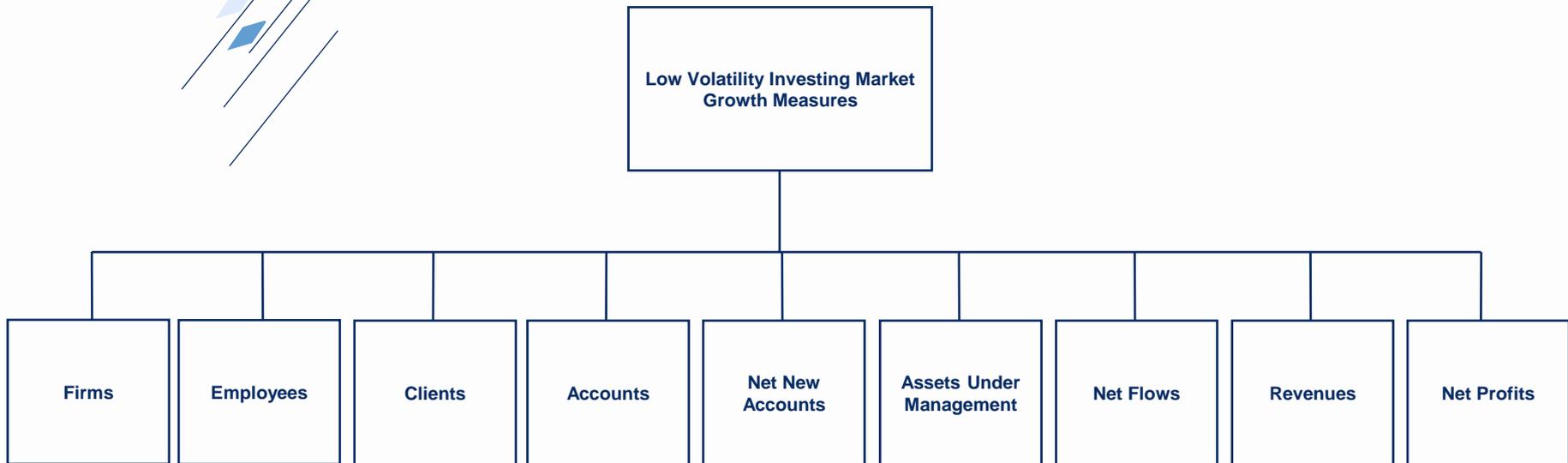
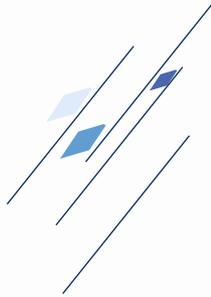
## Low Volatility Investing Market History



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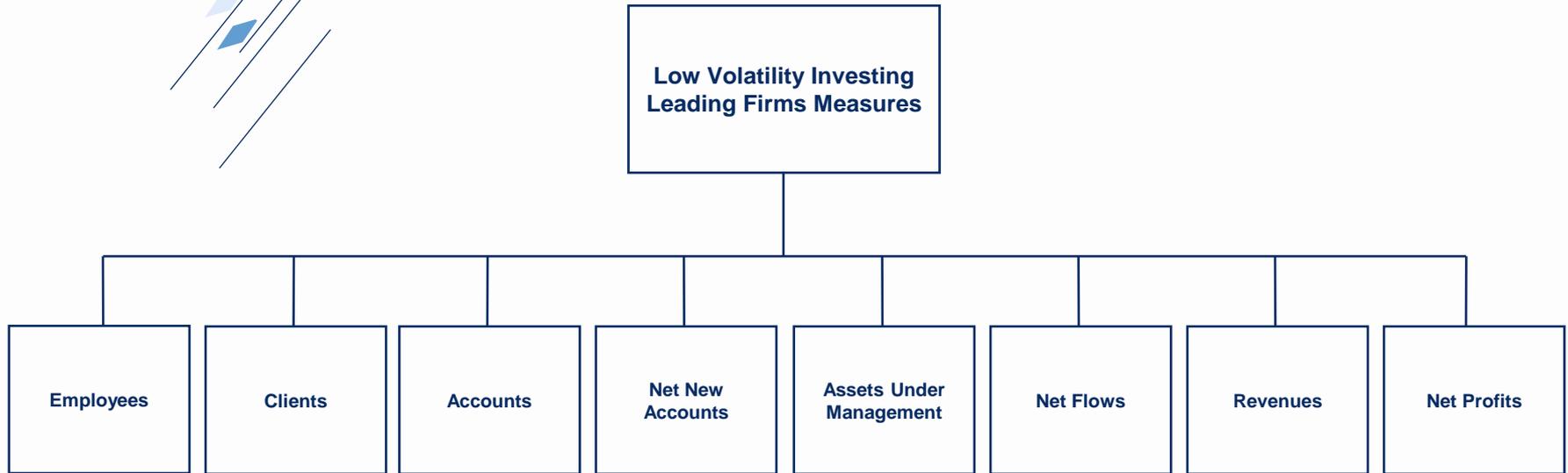
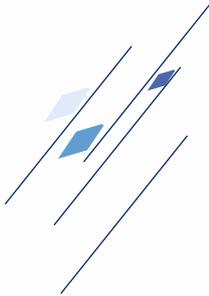
## Low Volatility Investing Market Growth Measures



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## Low Volatility Investing Leading Firms Measures

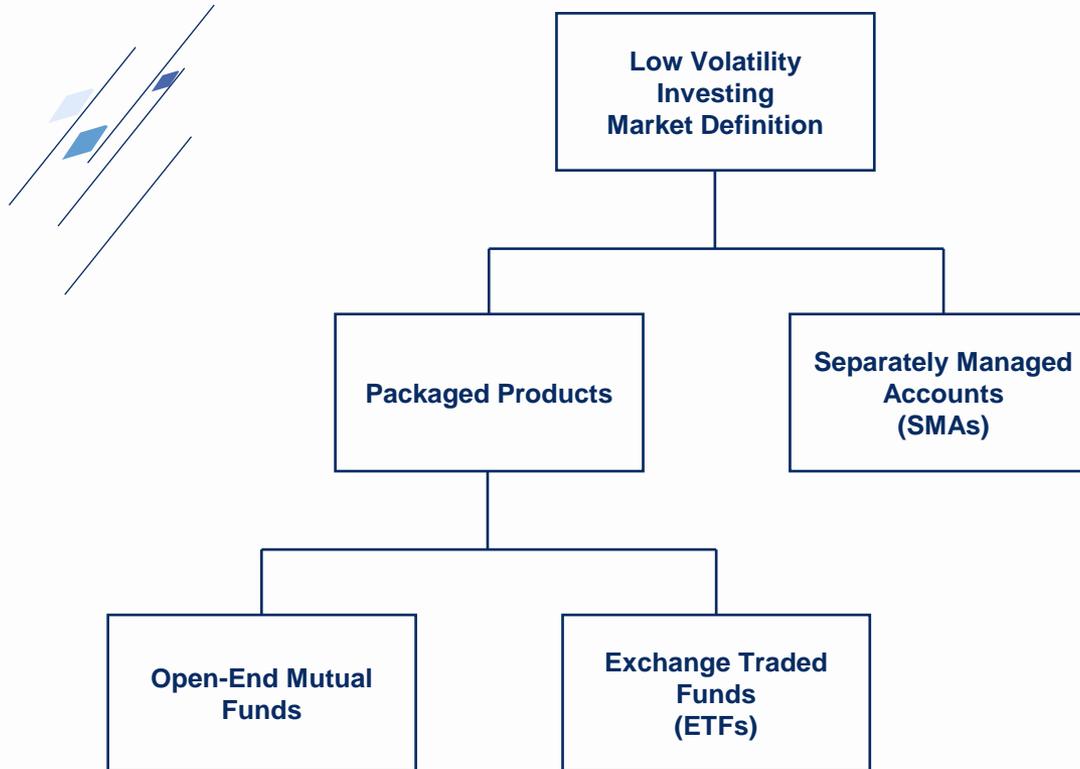


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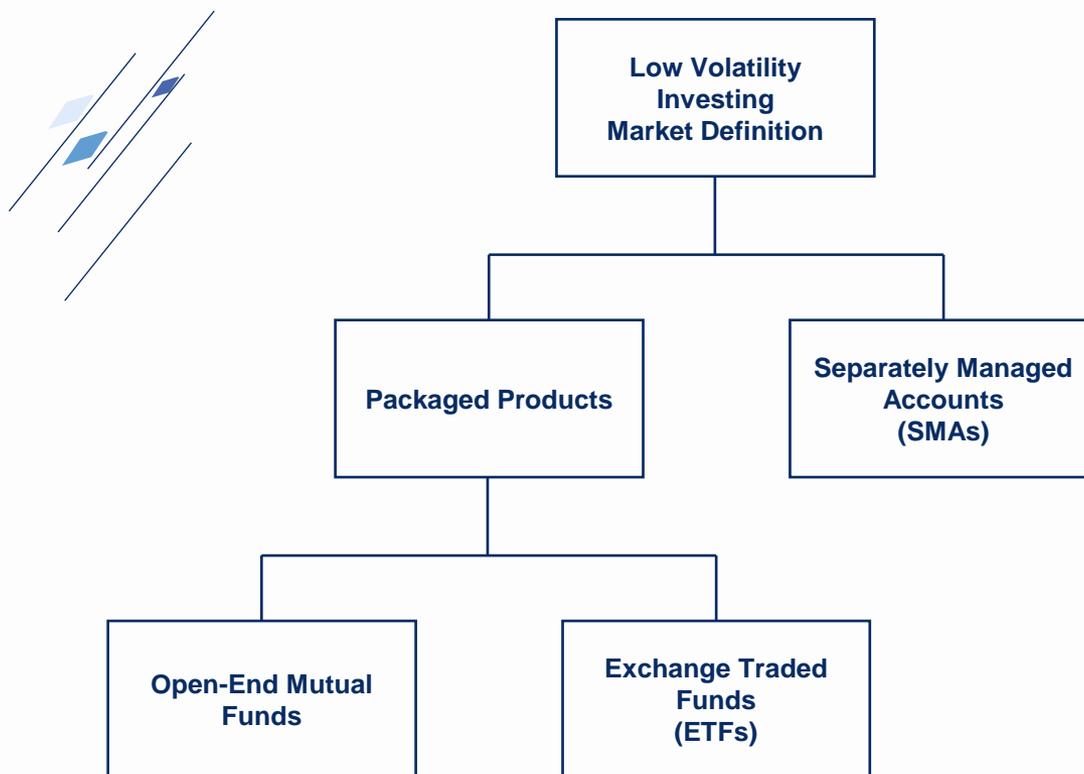
# Low Volatility Investing can be Defined to Include Packaged Products & Separately Managed Accounts (SMAs)

## Low Volatility Investing Market Definition



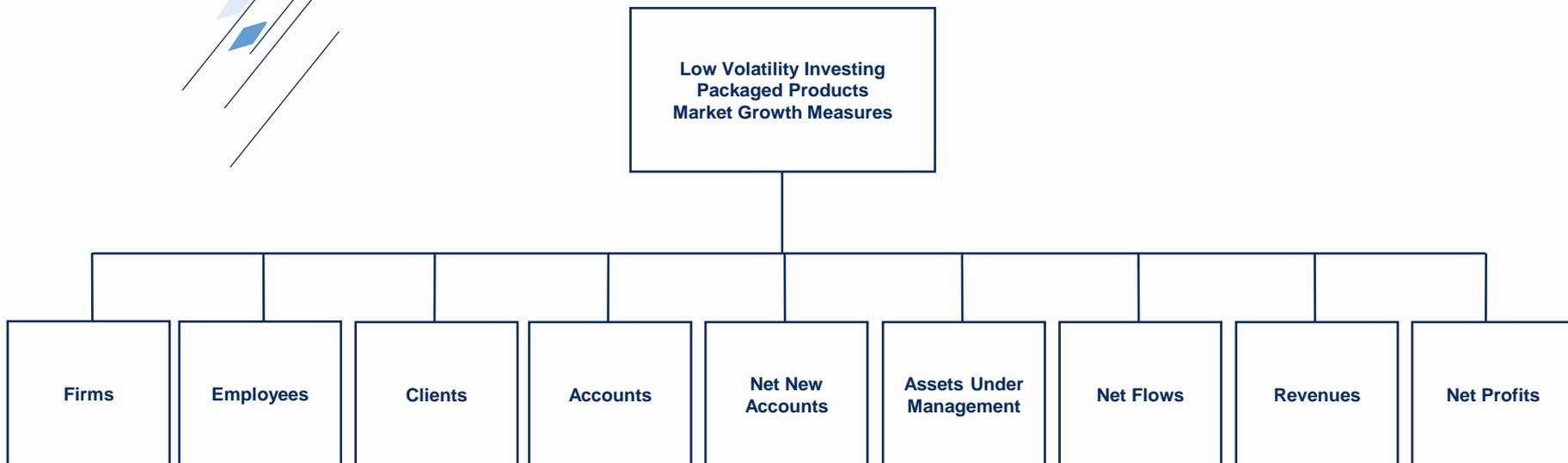
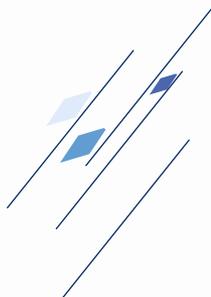
# Low Volatility Investing can be Segmented to Include Packaged Products & Separately Managed Accounts (SMAs)

## Low Volatility Investing Market Segments



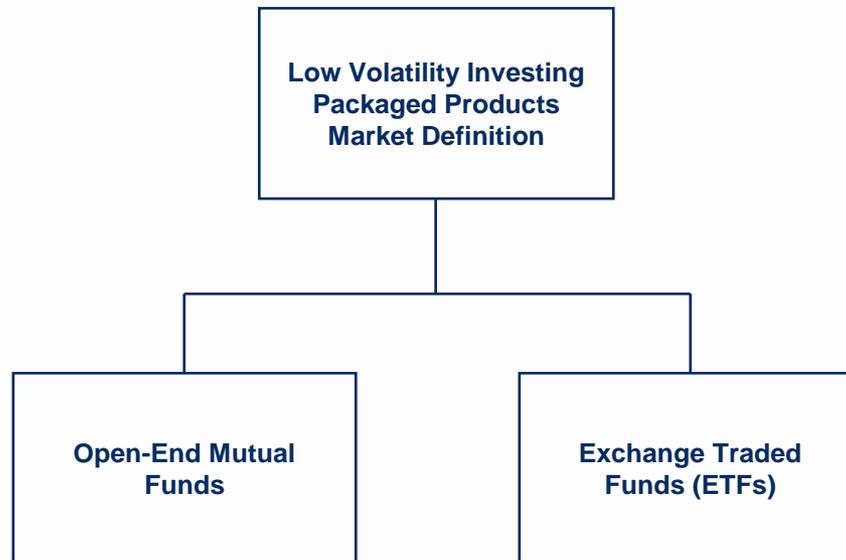
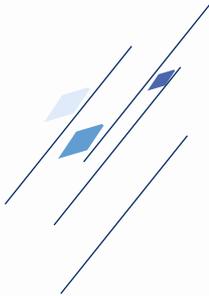
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## **Low Volatility Investing Packaged Products Market Growth Measures**

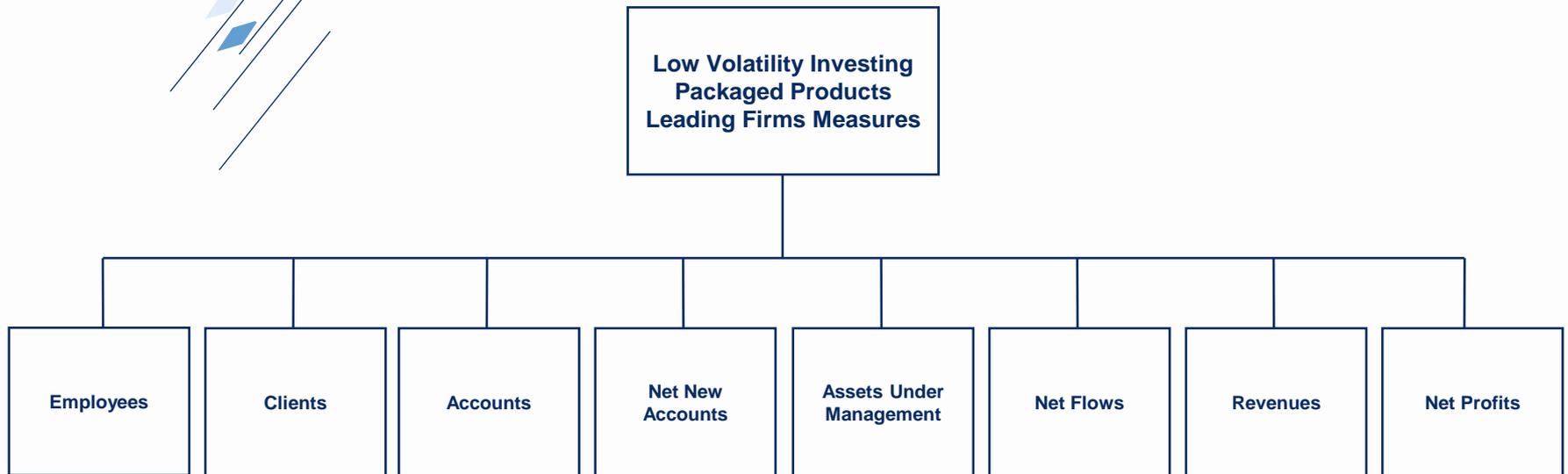
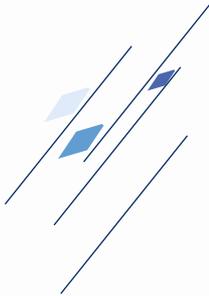


# Low Volatility Investing's Packaged Products can be Defined to Include Open-End Mutual Funds & Exchange Traded Funds (ETFs)

## Low Volatility Investing Packaged Products Market Definition

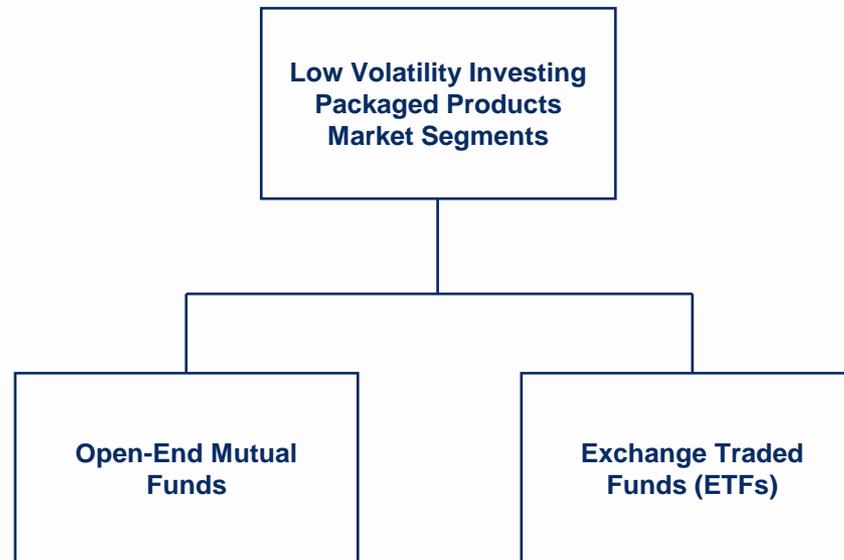
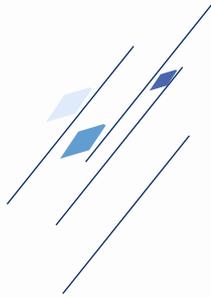


## **Low Volatility Investing Packaged Products Leading Firms Measures**



# Low Volatility Investing's Packaged Products can be Segmented to Include Open-End Mutual Funds & Exchange Traded Funds (ETFs)

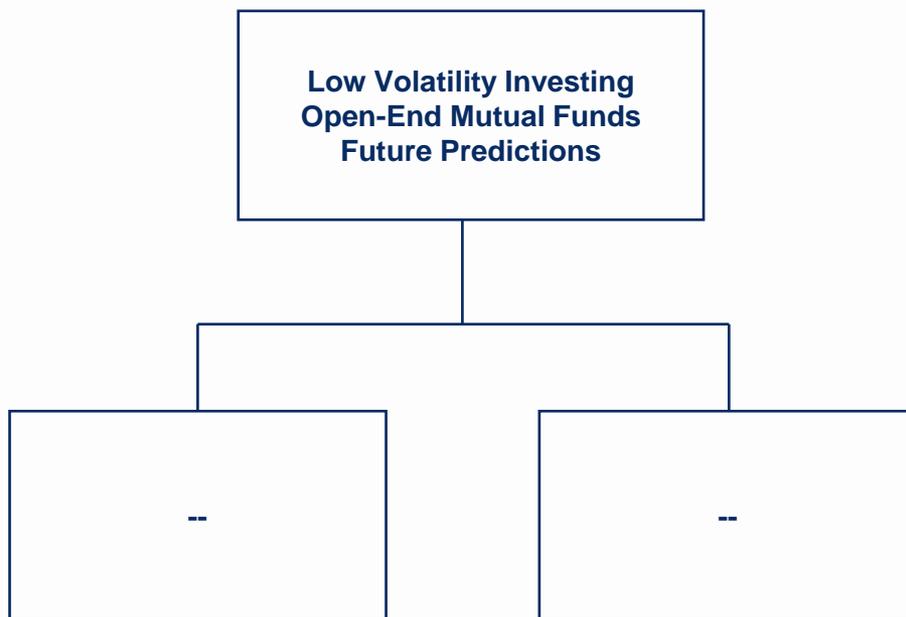
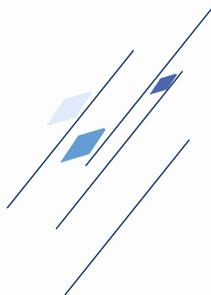
## Low Volatility Investing Packaged Products Market Segments



# ***Low Volatility Investing Open-End Mutual Funds' Future Predictions Include...***

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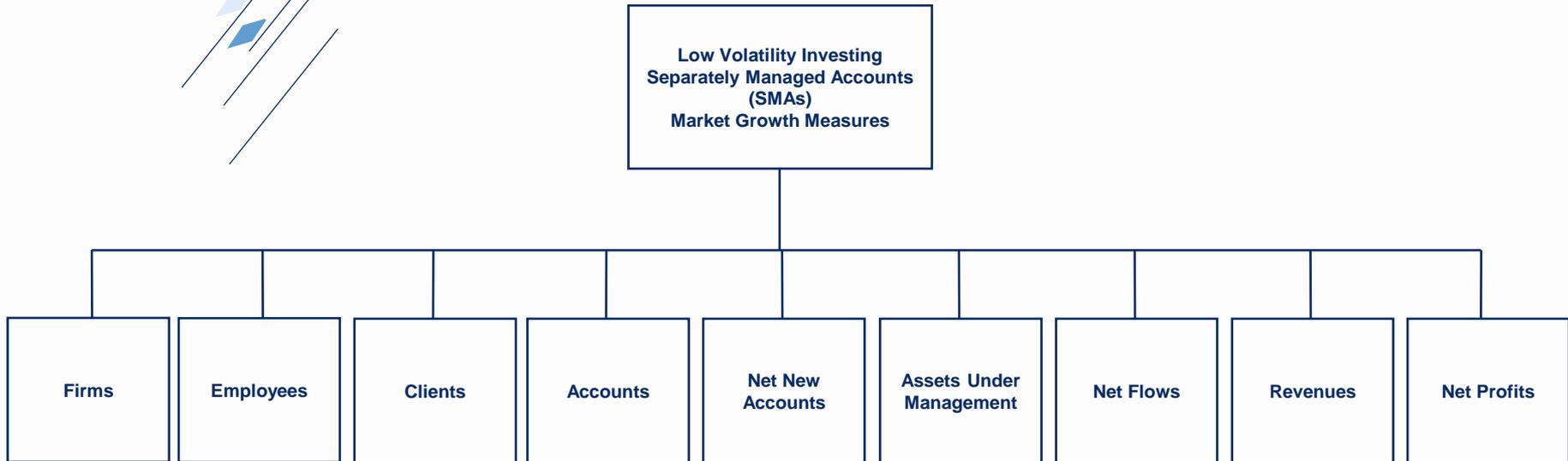
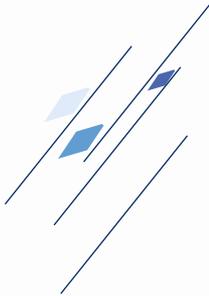
## **Low Volatility Investing Open-End Mutual Funds Future Predictions**



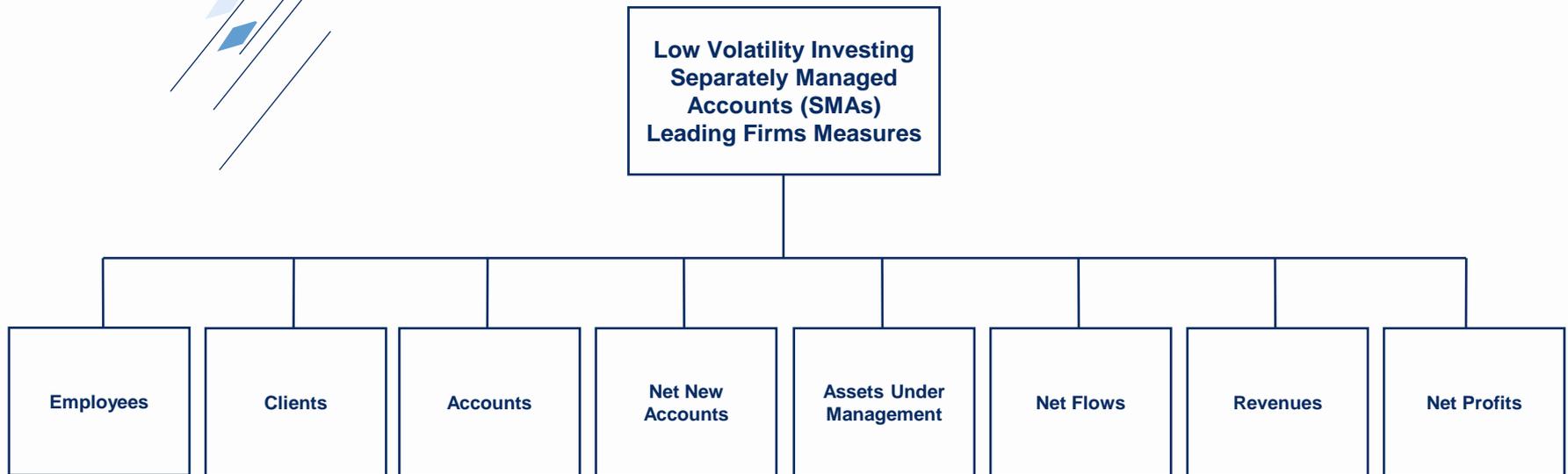
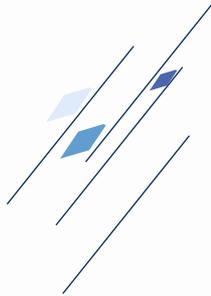
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## Low Volatility Investing Separately Managed Accounts (SMAs) Market Growth Measures

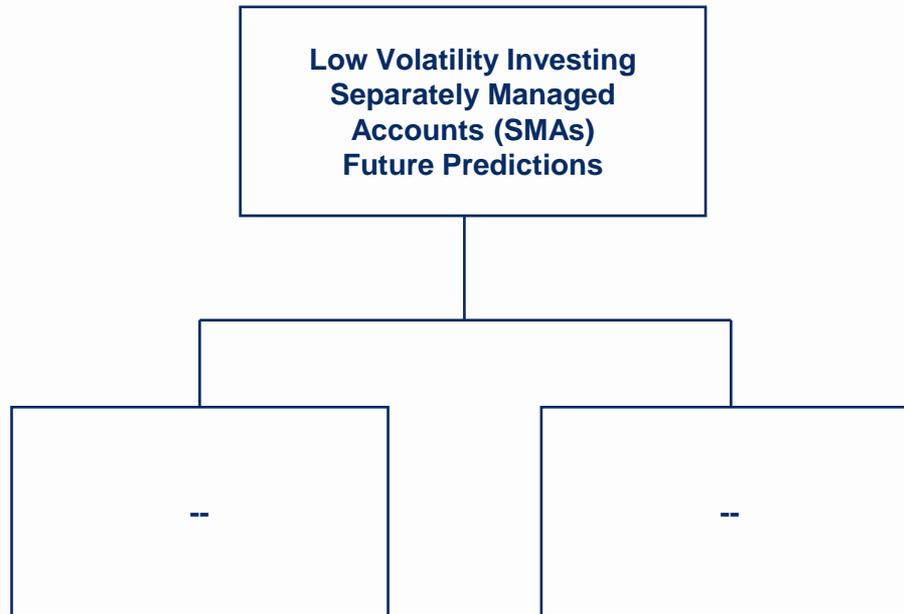
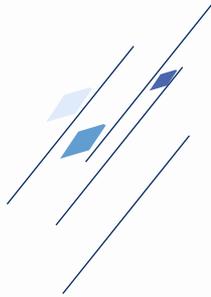


## **Low Volatility Investing Separately Managed Accounts (SMAs) Leading Firms Measures**



# Low Volatility Investing Separately Managed Accounts (SMAs) Future Predictions Include...

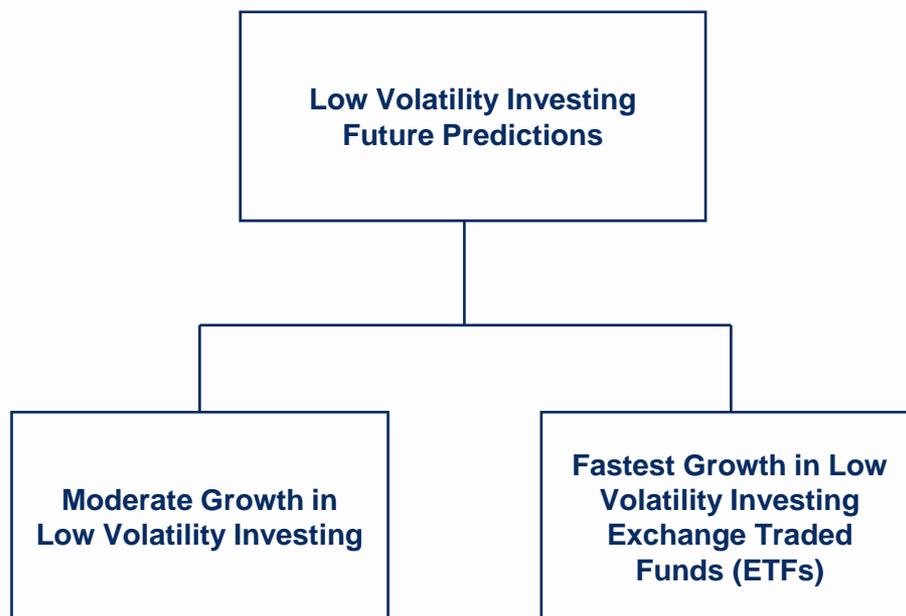
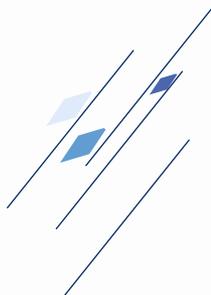
## Low Volatility Investing Separately Managed Accounts (SMAs) Future Predictions



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## **Low Volatility Investing Future Predictions**

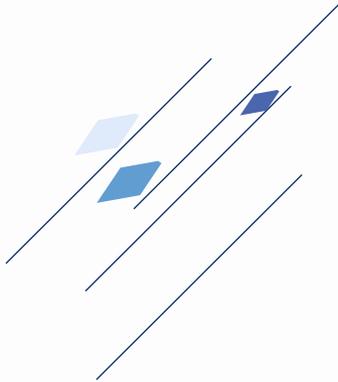


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# ***Low Volatility Investing's First Future Prediction is Moderate Growth in Low Volatility Investing***

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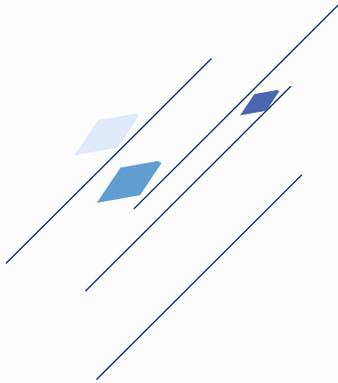
## **Comments**

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# Low Volatility Investing's Second Future Prediction is Fastest Growth in Low Volatility Investing Exchange Traded Funds (ETFs)



## Comments

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