

Van Hulzen Small Cap Strategy Achieves 3-Year Track Record, Receives 5-Star Morningstar Rating

Sacramento, Jan 31, 2019 (IssueWire.com) - Van Hulzen Asset Management, a Registered Investment Advisor based in El Dorado Hills, CA, is pleased to announce that its Small Cap Strategy has received a 5-star overall rating from Morningstar at its earliest eligibility based on risk-adjusted returns. For the three-year period ending December 2018, the strategy's performance ranks #2 in the Morningstar database among small-cap blend mutual funds (out of 214 funds) and in the 96th percentile of small-cap growth strategies (#8 out of 204 funds).

"This 5-star rating from Morningstar provides solid validation of how our differentiated approach to small-cap investing has produced strong results for our clients," said John Pearce, who is a Managing Director and the lead Portfolio Manager of the strategy. "We believe that our unwavering focus on quality and risk management has really paid off."

The strategy uses a "growth at a reasonable *profile*" approach, seeking to invest in companies that have already achieved profitability (not speculative) and are growing faster than their peers because of competitive advantages and industry leadership. The primary focus of the fundamental analysis is on quality, consistency and strong earnings momentum. The team combines a rigorous cashflow-based fundamental process with technical analysis to help formulate the upside/downside ratios that help determine portfolio weightings.

The fundamental stock selection process is similar to Van Hulzen's flagship large-cap covered call strategy, which has a 17+ year track record and has attracted more than \$350 million of assets as of December 31, 2018. "This process is ideally suited to finding value in smaller, undiscovered companies," says Craig Van Hulzen, Founder and CEO of Van Hulzen Asset Management. "Small-cap US is one of the few remaining asset classes where a manager can still achieve significant alpha." Mr. Van Hulzen also pointed out that the results have been GIPS verified. "This track record is real, not pro forma. We are excited to take it to market."

ABOUT VAN HULZEN ASSET MANAGEMENT

Van Hulzen Asset Management is a Registered Investment Advisor (RIA) with approx. \$870 million of assets under management. The Firm's sub-advisory business, which includes the small-cap strategy as well as large cap and covered call strategies, services institutions, RIAs, broker-dealers & other intermediaries. The Firm's covered call strategy has a 4-star Morningstar rating, and the large cap strategy was unrated as of this publication. The sub-advisory business had approx. \$430 million under management as of December 31, 2018.

PAST PERFORMANCE IS NO GUARANTEE OF FUTURE PERFORMANCE.

Morningstar Ratings™ are based on risk-adjusted performance as of 12/31/2018. The Morningstar Rating™ for a strategy is derived from a weighted-average of the performance figures associated with its three-, five- and ten-year (if applicable) Morningstar Rating™ metrics. For each strategy with at least a three-year history, Morningstar calculates a Morningstar Rating™ based on a Morningstar Risk-Adjusted Return measure that accounts for variation in a strategy's monthly performance (including the

effects of applicable fees), placing more emphasis on downward variations and rewarding consistent performance. The top 10% of strategies in each category receive 5 stars, the next 22.5% receive 4 stars, the next 35% receive 3 stars, the next 22.5% receive 2 stars and the bottom 10% receive 1 star.

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