

# Focus target growth strategy



Wealth  
Management

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## Focus target growth strategy

- Our focus target growth strategy targets specific subsets of the financial markets that we expect could outperform based on our analysis of current market trends and the economic cycle.
- The strategy is a complement to our core dividend growth strategy.
- Investment portfolios will be diversified based on a number of criteria, including:
  - Asset class (stock, bond, cash, other)
  - Size (large-cap, mid-cap, small-cap)
  - Style (growth vs. value)
  - Sector (consumer staples, financials, health care, industrials, technology, etc.)
  - Geography (domestic vs. international)
- We expect to hold targeted investments to capitalize on longer-term market and economic trends. The strategy is also managed on a **tactical** basis so we can raise cash and over/underweight targeted investments on a shorter-term basis. This may include holding positions, going to cash, and also moving in or out of positions in response to market and economic events.
- We **actively monitor** all holdings in the strategy on a regular and ongoing basis.
- We utilize a broad range of resources and tools to inform our investment perspective, including Thomson One/Reuters, RBC Capital Markets, Argus,

Credit Suisse, Dorsey Wright, Zack's, and Morningstar, as well as major financial publications and other subscription research.

### • **Methodology: buy discipline considerations**

- Demonstrated or potential leadership of the asset class, size, style, or sector
- Desire to emphasize an asset class, size, style, or sector
- Macroeconomic research and opinion, including leading domestic and global economic indicators
- Fundamental analysis of sectors, industries, regions and countries
- Technical analysis of sectors, industries, regions and countries
- Hold approximately 10 positions diversified by industry and sector

### • **Methodology: sell discipline considerations**

- Change in our investment opinion of the asset class, size, style, or sector
- Desire to de-emphasize an asset class, size, style, or sector
- Emergence of a more compelling investment opportunity
- Change in our perspective on market and economic fundamentals
- We actively manage the strategy on a discretionary and fiduciary basis in a fee-based account.