GIA Short Duration

Strategy Overview

Global Knowledge,
Global Perspective

GIA Partners, LLC is an independent, entrepreneurial Registered Investment Advisor owned by its investment team. GIA is a leader in providing yield enhanced fixed income solutions. Our clients include corporate and public pension plans, as well as endowments and foundations.

GIA Advantages:

- Highly experienced team
- Credit specialists
- Global perspective
- Simple, disciplined, repeatable process

Seasoned Investment Team
with over 25 years of experience:

Eduardo Cortes, CIO

David Ellis, CFA, Managing Director

Miguel Escobar, Director

Aswini Krishnan, CFA, Director

Hamburg Tang Jr., Managing Director

Albert Tseng, Deputy CIO

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GIA offers customized solutions for our clients' short term fixed income needs. Our strategy seeks to maximize returns while preserving capital. We manage the volatility of returns and credit risk without sacrificing liquidity. The securities universe primarily consists of U.S. government bonds and high quality U.S. dollar denominated securities, including government-related entities, corporations and supranationals.

Strategy Objectives

- Principal preservation
- Average credit quality AA-A
- Limited exposure to macro risks (interest rates, currency)
- Outperform a relevant fixed income benchmark over a market cycle

Investment Philosophy

- Credit risk is well compensated, analyzable, and diversifiable
- Fundamental factors drive long-term investment returns
- Macro risks are difficult to diversify
- Disciplined credit research across industries, ratings and national boundaries adds value over market cycles

Investment Process Highlights

- Identify liquidity needs, risk tolerance and overall objectives
- Fundamental, bottom-up portfolio construction that is straight-forward and repeatable
- Disciplined credit research
- Apply macroeconomic and geopolitical overlay
- Monitor portfolio to ensure risks, liquidity and return goals are on target

Applications for Strategy

- Permanent cash investments
- Operating cash
- Scheduled disbursement accounts
- Lower volatility retirement savings option

Client Service

At GIA, we take a partnership approach, serving as a resource for both our clients and their consultants. We work with our clients to achieve their objectives.