



Convergence
Investment Partners

Fundamental Investing with Quantitative Tools

Convergence Investment Partners is an active equity manager dedicated to managing outstanding U.S. equity strategies. Our team's experience spans decades of investing based on fundamental stock picking combined with advanced technology. This has allowed us to develop systematic stock selection strategies that can help garner powerful results. Convergence uses its proprietary process to select and rank investments, construct portfolios, and help manage risk in each of its products.

Our strategies are based on corporate fundamentals supported by compelling empirical results that are applied within each industry group. Our firm's name, Convergence, communicates our philosophy of a fundamental stock picking process that incorporates the intersection of sound investment theory executed in a disciplined environment utilizing advanced technology.

Strategies Offered: Core Plus (Large Cap Active Extension), Opportunities (Small Cap Active Extension), Dividend Growth, Unbiased Indexing, Domestic Active Tax Management, Market Neutral.

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