

Introduction

Black Komodo Investments FZE



Brief Overview – Growing Wealth through Value

- Black Komodo was born out the idea to build the **bridge to wealth**.
- We view asset management as a way to bridge the gap between the individually managed and the institutional, providing institutional level care, analysis and allocation to HNWIs, family offices and corporates.
- Building long term portfolios that identify, hold and grow value though time while preserving capital through risk alignment.
- We build and manage portfolios with a long-term focus to outlast, grow and protect capital.



Our offerings

We provide personalized risk aware alpha through two of our primary verticals:

Komodo Management: KM

- Private Mandates through SMA structures, tailored to you.

Komodo Specialist Service: KSS

- One time specialist team portfolio diagnostics and restructuring.



Komodo Management – Your capital stays with you.

- Clients hold all custody within custodians of their choosing.
- **24/7 visibility** and **transparency** as well as **verifiable performance** and **liquidity**.
- Private mandates are used to tailor portfolios to clients' specific requirements, understanding their risk first growth objectives.
- We build global and asset agnostic portfolios with a specialized focus in US public equities.
- This is a discretionary management service, we become your personalized manager.



Komodo Specialist Service — Your portfolio surgeon.

- The same level of transparency and visibility as our management service.
- Portfolio analysis and re-structuring/building of portfolios whether they be legacy, mismanaged or not up to your expectations.
- Specialized team brought in for a specific task: **Portfolio Architecture.**
- We believe allocation is just as important if not more important than the names of holdings in a portfolio.
- We provide a specialized end to end service of portfolio diagnostics as well as discretionary rebalancing and portfolio re-structuring and a handover back to your management.



Custodians we work with



J. SAFRA SARASIN



Deutsche Bank



Interactive
Brokers

charles
SCHWAB

Coutts



EFG



HSBC



We are custodian agnostic and work with Tier-1 custodians, where **you** keep the funds, ensuring transparency and 24/7 visibility.



Black Komodo functions as the the **external research, analysis and execution brain** for private mandates.

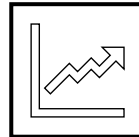
Utilizing the **expertise** of our highly skilled technical research team and our rigorous **proprietary systems** to provide institutional level analysis, portfolio construction and management typically reserved for the world's elite allocators.



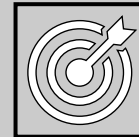
Our Strategy



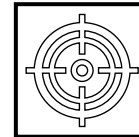
We employ a long-only strategy, and we see ourselves as the custodians and guardians of your capital first.



Our Goal: Grow your capital and protect the downside.



Our Aim: Outperform the benchmark on a long-term consistent basis, while providing income and protecting your capital by limiting the downside.



We are not an absolute return strategy with a set target that we will hit every year. We focus on identifying and capturing mispriced value across long term horizons.

Our Process

- We approach investing through a synergetic lens of value and growth, applying macro aware, risk aligned bottom up analysis through our proprietary **EPARCS*** system and **KPS**** Pareto Allocation methodology.
- Our risk framework is designed to operate within the safety of Tier-1 custodial environments. We build and manage portfolios from a risk aligned perspective first.
- We are research centric with a 10 member research team of technical expertise focused on data backed fundamental analysis with a 5 point scenario mapping layer to allocate capital efficiently and build long lasting value focused portfolios.
- Proven investment methodology with a 5-year history of strategy execution.

*Efficient Portfolio Allocator and Risk Control System

**Komodo Portfolio Solutions



Our Take on the Changing Landscape

- Over - diversification and mismanagement of risk are the two biggest silent killers of growth and turn safe investing into very dangerous investing.
- Building a **concentrated-diversified** portfolio of safe, reliable and consistent firms that are **change drivers**, building the world around us preserves growth and aligns one's portfolio with the dynamic nature of the world, compounding its growth alongside the developments and advancements of the world.
- **Allocation** is the biggest differentiator and compounder of a portfolio, allocating capital is the sole difference between a market beating portfolio and one that lags the broader market



Questions

If you have any questions, please contact us at:



bki@blackkomodoinvestments.com



<https://www.blackkomodoinvestments.com/>





Disclaimers

REGULATORY DISCLOSURE & SMA NOTICE

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