

State Street Global Advisors and Polen Capital: Start Broad and Go Beyond



Working to build custom portfolios that best align with client goals is a rewarding endeavor for many advisors, especially when you can select from an expansive universe of pre-vetted institutional strategists. Communities, Orion's robust investment model marketplace offers just this. It gives advisors access to a variety of pre-vetted institutional strategists with the ability to easily search across multiple asset categories and filter by expansive criteria. Yet, with so many options, where do you start?

For this month's strategist pairing, we propose you start broad and then go beyond. This month we look at the value in pairing State Street Global Advisors (SSGA), the pioneer of low-cost index ETFs, and Polen Capital, a boutique manager with a high-conviction growth strategy.

Start Broad and Go Beyond

Brand Strategist: SSGA "Broadly Diversified Low-Cost ETF Leader"

- SSGA is a well-established brand firm, well known for pioneering low-cost index investing and being a leader in ETFs, including launching the first U.S. ETF.
- Their models are more broad-based and diversified, utilizing a wide selection of their low-cost ETFs across equity and fixed income asset classes.
- They offer risk-based allocation strategies in standard and tax-sensitive versions, which provide both passive and more active types of models.
- These strategies are designed to represent more of an overall portfolio's

core holdings to help take advantage of market movements while providing ample diversification benefits.

Boutique Strategist: Polen Capital “Going Beyond with a Focus on Growth”

- Polen is a boutique manager with a more active and concentrated approach to selecting high-quality individual stocks with growth potential.
- They are a growth manager from start to finish and are focused on companies with sustainable long-term earnings growth that also display superior financial strength.
- There are various exposures for their strategies, including U.S. large-cap, U.S. small-cap, and international - all of which have been outstanding performers.
- Their strategies pair well with a more diversified passive core, as they can add more of the targeted alpha-generation potential.

With this approach, you can present your clients with a core portfolio that can be compared to a lush, diverse, and healthy forest and then focus on the uniqueness of a few of the individual trees, in this case, a boutique manager with strong roots positioned for long-term growth.

Orion’s Communities include 24 SSGA models and three - soon to be four - Polen Capital models. Log in now to access valuable information for both strategists, including fact sheets, marketing materials, and more.

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