

SGA Nominated as Emerging Manager of the Year

Newport Beach, CA (January 9, 2012) – **Strategic Global Advisors** (SGA) has been nominated by the editors of Institutional Investor's [Money Management Letter](#) for the Emerging Manager of the Year as part their **11th Annual Public Pension Fund Awards for Excellence**. "We are grateful to Money Management Intelligence for this honor and nomination. We also appreciate the comments shared by our clients," said Cynthia Tusan, Founder, President and lead Portfolio Manager of the firm. "We have worked very hard to do our best for our clients over the years and this recognition makes us want to do that much better." SGA ended 2011 with over \$300 million in assets under management.

SGA is one of three finalists for the award which will be given on March 25 at the Park Hyatt Aviara in San Diego, CA as part of **IMN's 2012 Spring Investment Series**.

Provided below is the excerpt about SGA's nomination from Money Management Letter's January 6 edition. Photos provided by SGA.

Jan 06, 2012 - [Mark Fortune](#)

Strategic Global Advisors In 2011, six-year-old Newport Beach, Calif.-based quant firm Strategic Global Advisors secured \$170 million in new assets, including three new mandates from public funds. The firm now boasts a total of \$270 million of assets under management, \$230 million from public pension plans. The firm focuses on international markets, using a quant strategy blended with traditional fundamental analysis in an effort to pick up extra alpha that is missed by other firms that are more fundamental. It builds its technology in-house, which allows the firm to provide more thorough risk and performance attribution, according to **Cynthia Tusan**, president.



According to eVestment Alliance, as of Sept. 30 the returns of SGA's International Small-Cap Core strategy were 3.38%, versus a -4.39% median return for the universe, placing SGA in the third percentile. The returns of its International Large-Cap Core strategy fell in the second percentile of managers, returning -2.33%, versus a -9.25% median return for the universe.

"SGA applies a consistent style-neutral, quantitative approach with a fundamental overlay to all

investment strategies," said a manager-research consultant with a large West Coast firm. "Since inception, the firm has remained stable with no professional turnover. Performance has been consistent, fully participating in up markets, and doing well in the bear markets."

Tusan considers winning a mandate from the **Illinois Teachers Retirement System** the highlight of the year. "We were working on it for three-and-a-half years and the level of analysis we produced was the best we'd done in our careers. We really learned from it, and there were some high fives when we finally won the account." She also noted **Illinois State Universities Retirement System's** boost to its existing account.

"They are a very solid firm," said **Charles Handy**, an investment officer at Illinois Teachers, which awarded the firm \$25 million in 2011. "We'd been watching them for some time. And when they built a little deeper staff and developed a little longer track record, we hired them." Handy added that the fund was impressed with the firm's quant process and that there was a good chance the fund would graduate the firm to its full team and give it more money.

Gary Baierl, who joined the firm early as a co-founder and chief investment officer, does a lot of the heavy lifting when it comes to building systems. Tusan, lead portfolio manager for the firm, explained, "When I hired Gary Baierl as our cio, he convinced me of the power of building systems inhouse. With six years of hard work under our belts, the entire team is very excited about the capabilities we have designed and built," Tusan said.



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About Strategic Global Advisors:

Strategic Global Advisors, LLC is an SEC registered investment advisor headquartered in Newport Beach, CA. SGA was founded in 2005 as an independent employee and majority women owned investment firm focused on integrating quantitative and fundamental analysis in international, global and domestic equity strategies. The firm's portfolios are built through bottom-up stock selection using in-house, proprietary systems and quantitative models along with traditional fundamental analysis. SGA is certified as a Women's Business Enterprise (WBE) by WBENC and the California Supplier Clearinghouse.

For more information on SGA please visit our website: <http://www.sgadvisors.com>