



ENSEMBLE CAPITAL | By the Numbers

\$1.0B Assets Under Management

EST. 1997 15 year performance track record

100% Employee Owned & Independent

99.4%* Annual Client Retention Rate

164 Combined Years of Industry Experience

All data as of December 31, 2019

** Annual average retention rate over previous 10 years*

Sean Stannard-Stockton, CFA is the chief investment officer of Ensemble Capital Management and portfolio manager of the Ensemble Fund. A prolific writer and public speaker, Sean is available to speak on topics related to equity investing. Ensemble Capital invests in a focused portfolio of securities (15-30 at a time) and Sean can speak in depth about these businesses as well as broader equity market conditions. He has been quoted on these topics by the Wall Street Journal, Motley Fool, the Financial Times, The Hollywood Reporter, The Dallas Morning News, Investment News and the book The Safe Investor.

Sean is available to speak on a wide variety of equity market related topics such as:

- How are technology and communication platforms changing the competitive dynamics across the economy, including in traditionally non-technology driven industries?
- Which business models and industries are emerging as newly competitively advantaged versus those that are simply experiencing a hot streak?
- Which business models and industries that were once competitively advantaged now face structural decay in their competitive advantages?
- How do macro trends such as higher interest rates or inflation impact how equity investors should be evaluating individual stocks?

Examples of stocks with widespread interest on which Sean is available to speak: Alphabet, Booking Holdings, Mastercard, Charles Schwab & Co, Netflix, Ferrari, Nike, Starbucks. Please read important disclosures [here](#)

Sean and Ensemble's research team write regularly about equity investing at www.IntrinsicInvesting.com.

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RECENT QUOTES IN THE MEDIA:

[THE WARREN BUFFET-INSPIRED APPROACH TO INVESTING](#) | Sean Stannard-Stockton and Todd Wenning were quoted on Business Insider. Please read important disclosures [here](#) (Dec. 2019)

[WITH JONY IVE'S SUCCESSOR, APPLE BETS A PRAGMATIST CAN TURN PROPHET](#) | Sean Stannard-Stockton was quoted in the Wall Street Journal on Apple and the departure of Jony Ive. Please read important disclosures [here](#) (July 2019)

[THIS AUTO-PARTS MAKER DESERVES ANOTHER LOOK – AS A TECH STOCK](#) | Sean Stannard-Stockton was quoted in Barron's on Sensata. Please read important disclosures [here](#). (October 2018)

[GOOGLE EARNINGS HIT BY EUROPEAN FINE](#) | Sean Stannard-Stockton was quoted in the Wall Street Journal on Google Earnings about European Fine. Please read important disclosures [here](#) (July 2018)

RECENT INTERVIEWS:

[SEAN STANNARD-STOCKTON ON THE ACQUIRERS PODCAST](#) | Sean Stannard Stockton was interviewed by Tobias Carlisle on The Acquirers Podcast. Please read important disclosures [here](#). (Dec. 2019)

[THERE ARE 'GREEN SHOOTS' IN US MANUFACTURING](#) | Sean Stannard Stockton was interviewed on CNBC. Please read important disclosures [here](#). (Dec. 2019)

[SEAN STANNARD-STOCKTON ON INVESTING CITY PODCAST](#) | Sean Stannard Stockton appeared on the Investing City podcast Please read important disclosures [here](#). (September 2019)

[SEAN STANNARD-STOCKTON DISCUSSES US-CHINA TRADE WAR](#) | Sean Stannard Stockton appeared on CNBC to discuss the recent flare up in the US-China trade war Please read important disclosures [here](#) (August 2019)

[SEAN STANNARD-STOCKTON DISCUSSES IMPACT OF TARIFFS ON CNBC](#) | Sean Stannard Stockton appeared on CNBC to discuss the impact of Tariffs on the US economy Please read important disclosures [here](#) (July 2019)

[THE QUALITATIVE GENIUS OF SEAN STANNARD-STOCKTON](#) | Sean Stannard-Stockton was interviewed by The Motley Fool. Please read important disclosures [here](#) (April 2019)

SEAN'S WRITING:

[WHO'S SCARED OF GOOGLE? NOT BOOKING HOLDINGS](#) Please read important disclosures [here](#) (Dec. 2019)

[POSITION SIZING: HOW WE ASSESS CONVICTION](#) Please read important disclosures [here](#) (Dec. 2019)

[POSITION SIZING: WHY CONVICTION MATTERS](#) Please read important disclosures [here](#) (Sept. 2019)

[HOW MANY STOCKS SHOULD BE IN YOUR PORTFOLIO](#) Please read important disclosures [here](#) (April 2019)

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