



**ENSEMBLE CAPITAL | By the Numbers**

\$1.40B Assets Under Management

EST. 1997 17 year performance track record

100% Employee Owned & Independent

99.3%\* Annual Client Retention Rate

*All data as of December 31, 2020*

*\* 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, Starbucks. Please read important disclosures [here](#)

Sean and Ensemble's research team write regularly about equity investing at [www.IntrinsicInvesting.com](http://www.IntrinsicInvesting.com).

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**PHONE**

650.696.1240

**EMAIL**

[sean@ensemblecapital.com](mailto:sean@ensemblecapital.com)

**WEBSITE**

[www.EnsembleCapital.com](http://www.EnsembleCapital.com)

**TWITTER**

[@IntrinsicInv](https://twitter.com/IntrinsicInv)

Ensemble Capital, 1350 Bayshore Highway, Ste 460, Burlingame, CA 94010

## **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)

## **RECENT INTERVIEWS:**

[MOTLEY FOOL LIVE: INTERVIEW WITH ENSEMBLE CIO SEAN STANNARD-STOCKTON](#) | Sean Stannard-Stockton was interviewed on The Motley Fool. Please read important disclosures [here](#) (Oct. 2020)

[CONVICTION: A CRITICAL ELEMENT OF A SUCCESSFUL INVESTMENT PROCESS](#) | Sean Stannard-Stockton was interviewed on The Take 15 Series Podcast. Please read important disclosures [here](#) (June 2020)

[THE MARKETS ARE UNDERGOING A 'RISK-OFF RALLY'](#) | Sean Stannard-Stockton was interviewed on CNBC. Please read important disclosures [here](#) (May 2020)

[SEAN STANNARD-STOCKTON ON INTELLIGENT INVESTING IN CRISIS MODE](#) | Sean Stannard-Stockton was interviewed on MOI Global. Please read important disclosures [here](#) (March 2020)

[DISNEY PLUS IS 'NOT A SUBSTITUTE' FOR NETFLIX](#) | Sean Stannard Stockton was interviewed on CNBC. Please read important disclosures [here](#). (January 2020)

[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)

## **SEAN'S WRITING:**

[POSITION SIZING: MARRYING THE BEST OF QUALITATIVE & QUANTITATIVE DECISION MAKING](#) Please read important disclosures [here](#) (Jan 2020)

[THE OVERTON WINDOW & UNDERSTANDING WHAT IS POSSIBLE](#) Please read important disclosures [here](#) (Nov. 2020)

[UNDERSTANDING STAKEHOLDER VALUE: WHERE DO PROFITS COME FROM?](#) Please read important disclosures [here](#) (September 2020)

[CORONAVIRUS: THE NEXT NORMAL](#) Please read important disclosures [here](#) (May 2020)

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PHONE	EMAIL	WEBSITE	TWITTER
650.696.1240	sean@ensemblecapital.com	www.EnsembleCapital.com	@IntrinsicInv

Ensemble Capital, 1350 Bayshore Highway, Ste 460, Burlingame, CA 94010