



Clinton Investment Management is an independent municipal bond manager that utilizes <u>tactical</u>, <u>actively-managed strategies</u> to deliver significant relative value through a <u>multi-faceted</u> and <u>research-driven</u> process.

## Why Clinton Investment Management

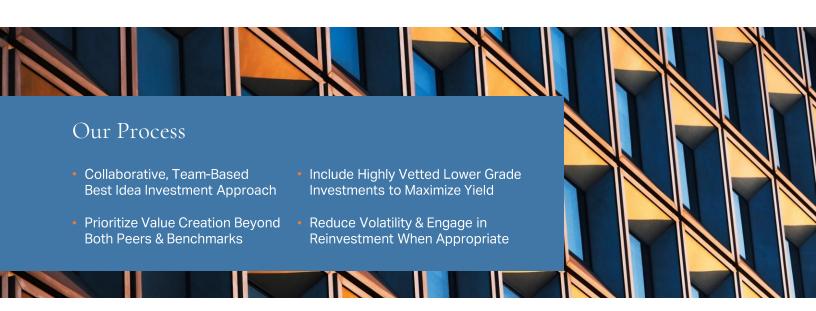
- Active Portfolio Management
- Customized Portfolios
- Relative Value Focus
- Client First Mentality
- Disciplined Investment Process
- Proven Investment Team

- Our core value at CIM is total client focus. We are accessible and accountable, with the interest of the firm and the client fully aligned when building and optimizing each individual portfolio and strategy
- Nimble in operations, independent in approach and powered by a home-grown process, our sole mandate is protecting and growing the capital of the individuals and institutions we serve
- Our strategies do not settle for matching expected returns. We strive to outperform benchmarks and peers by constantly innovating and setting the standard for what municipals offer

2007 Established

Stamford, CT
Headquarters

\$3.5 Billion
AUM (06/30/2025)



## Our Strategies -

· Credit Opportunities

Short Duration

Taxable Market Duration

Market Duration

Intermediate Duration

## We Focus On

Duration



We position portfolios based on our view of the future direction of interest rates, taking advantage of inefficiencies along the municipal vield curve.

**Sector Allocation** 



We aim to further enhance client returns through sector allocations, viewing each state as its own municipal sector in addition to generic municipal sectors.

**Security Selection** 



Through deep research and quantitative analysis, we seek to uncover and exploit any structural mispricing that exist in individual securities.

Contact us to find out how Clinton Investment Management exceeds expectations