

# Exceed Expectations

Actively Managed Municipal Bond Strategies Built for Performance

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

## Why Clinton Investment Management

- Active Portfolio Management
- Relative Value Focus
- Customized Portfolios
- 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

\$3.8 Billion  
AUM (12/31/2025)

## Our Process

- Collaborative, Team-Based Best Idea Investment Approach
- Prioritize Value Creation Beyond Both Peers & Benchmarks
- Include Highly Vetted Lower Grade Investments to Maximize Yield
- Reduce Volatility & Engage in Reinvestment When Appropriate

## Our Strategies

- Credit Opportunities
- Market Duration
- Short Duration
- Intermediate Duration
- Taxable Market 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 yield 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