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Disciplined Global

Featured Insights

Video: 5 Pillars to Support Increasing Allocations to International Markets (<https://www.mondrian.com/video-5-pillars-to-support-increasing-allocations-to-international-markets/>)

Senior Portfolio Manager Nigel Bliss discusses why investment opportunities set outside the US are becoming increasingly compelling and how international investments play a critical role in truly diversified portfolios. (<https://mondrian.us/>) (<https://www.linkedin.com/company/mondrian-investment-partners/>)

READ MORE
(<https://www.mondrian.com/video-5-pillars->)

Value Investors

Since 1990

Investment Capabilities
(/investment-capabilities/)

About Mondrian
(/about-us/)

to-support-increasing-allocations-to-international-markets/)

Video: AI Markets in Transition: Discipline Amid Rapid Expansion
(<https://www.mondrian.com/video-ai-markets-in-transition-discipline-amid-rapid-expansion/>)

After powering equity markets, AI investment may be nearing an inflection point as scaling frontier models demands unprecedented capital. This video explores the implications for valuations, balance-sheet risk, and the opportunities for value investors.

READ MORE
(<https://www.mondrian.com/video-ai-markets-in-transition-discipline-amid-rapid-expansion/>)

INVESTMENT CAPABILITIES

Diversified Investment Product Offering

All of our investment products utilize value disciplines that have been successfully applied since our founding in 1990.

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Equity

- An approach that seeks to provide a rate of return meaningfully greater than the client's domestic rate of inflation
- Client portfolios that aim to preserve capital during protracted global market declines
- Portfolio performance that has been less volatile than the relevant benchmark and most peers in the universe

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Fixed Income

- We have a disciplined investment philosophy that has been in place since we were founded in 1990
 - Stable, well-resourced team with expert knowledge of the asset class
- Our inflation forecasting uses proprietary quantitative models that
- drive process and provide structure - the 'relative' inflation forecasts produced are key for our process

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Capabilities

International Equities

We take pointed views at both the market and security level, employing a consensus-driven decision making process with the head of the team having the casting vote.

Global Equities

In the management of global equity assets, Mondrian invests in securities where rigorous dividend discount analysis identifies value in terms of the long-term flow of income.

Emerging Markets Equities

For over 20 years, Mondrian's knowledgeable emerging markets investment team has offered an active, value-oriented approach to investing in the developing world.

Small Cap Equities

We utilize detailed, long-term fundamental analysis and a consistent application of our income-oriented valuation approach.

Fixed Income

Mondrian takes a forward-looking real income approach, investing in bond markets that offer high income in inflation and risk-adjusted terms.



[View all Investment Capabilities \(/investment-capabilities/\)](/investment-capabilities/)

ABOUT MONDRIAN

Mondrian is an employee owned investment management firm with offices in London, Philadelphia and Singapore

We are value investors across the globe in both equity and fixed income asset classes. Founded in 1990, we have employed a rigorous fundamental research process that is the foundation of our success. Mondrian's well-resourced investment team manages assets on behalf of over 250 institutional client accounts. All of our investment products utilize value disciplines that have been successfully applied since our founding in 1990.

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Stable, Consistent Leadership with Time- Tested Investment Process Since 1990

OUR TEAM

Deep, Diverse and Experienced Team

Mondrian is comprised of over 150 professionals who average approximately 10 years working at the firm. We believe that it is best to locate our investment team in a single location in London to encourage dialogue and consistency to our disciplined valuation approach. Additionally, we have dedicated client service and business development teams located in Philadelphia, London and Singapore.



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Client Services & Business Development

We have dedicated client service and business development teams located in Philadelphia, London and Singapore.



Investment Team

A team of 52 investment professionals all located in London. Our members work together in a team-based decision-making environment.



CIO Forum

Mondrian's CIO Forum meets regularly to share ideas and ensure the consistency of our investment process across the firm.

MONDRIAN



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News & Insights

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NEWS & INSIGHTS



(<https://www.mondrian.com/video-5-pillars-to-support-increasing-allocations-to-international-markets/>)



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