



STEADY HAND

www.steadyhand.com



02

STEADY
Investments

Tom Bradley, President, (second from left) surrounded by Steadyhand Employees

A photograph of four men standing in a modern office environment. The man in the center is wearing a light blue button-down shirt and glasses. To his left is a man in a white button-down shirt. Behind them are two other men, one in a light blue shirt and one in a white shirt. They are all smiling. The background features wood-paneled walls and a dark countertop.

ADYHAND

ment Funds



Chris Stephenson, Investor Specialist



Seeking the highest overall client returns, Vancouver-based Steadyhand is driven to achieve the best money management opportunity for its private client base.



Tom Bradley, President

CO-FOUNDED IN 2007, Steadyhand focuses on financial management for private individuals – no corporations or institutions – an element that highlights the unique personal touch of the organization. The company is led by President Tom Bradley, an established investment manager in the institutional markets, such as pension funds and endowment plans, who in 2007 branched off to develop this independent entity.

“To be blunt, the industry was getting too fat and flabby,” Bradley told *The Canadian Business Journal*. “That relates to the fees and the kinds of portfolios that are being set up for clients, and the practices of the industry.

We thought there was a huge opportunity to provide a simpler, cleaner, and higher return offering to private clients.”

Particularly unique to Steadyhand is its use of pooled funds and prospective mutual funds to manage client money and build suitable client portfolios. Rather than selling funds through an advisor network, Steadyhand also works directly with its clients as a licensed dealer. Bradley summarized, “This allows us to control the way our funds are used and to keep down the fees. We’re taking the middle man out of the picture and reducing clients’ fees by one per cent per year.”



Five years and counting.

Congratulations, Steadyhand,
on your outstanding growth.

Deloitte.

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Investment philosophy

Recently celebrating five years in business, Steadyhand's results have been well received thus far. Different from the industry standard of many financial organizations that have become consumer product marketers, the team at Steadyhand is "wired as investors" to its core. Its defined investment philosophy, keenly entitled 'Undexing', allows Steadyhand to manage funds not limited by benchmarks like the Toronto Stock Exchange or Dow Jones markets; rather, the firm links to undervalued securities to ensure profitability.

"Our investment philosophy is not rocket science, it's not even something new – it is more of

a throwback," Bradley said. "And it is rare to see big firms with the ability to do what we do, like diverging from the index and owning fewer stocks."

Part of the philosophy of Steadyhand is topping those indexes through investments with the highest convictions. Initially building the company around how it would want its own money to be managed, and which fees would be applicable, Steadyhand has now over the years created more than a fund manager. Bradley summarized, "So far, the results are great, our performance is good, and our clients are delighted with what we are doing. As much as it is a unique model, and with no one else having gone this way, it is working."



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Exceptional experiences & Powerful partnerships

Steadyhand Investment Management Ltd. opened for business five years ago with a focus on empowering clients to be better investors. They carefully selected partners that shared that philosophy. Their custody provider? RBC Dexia.

RBC Dexia's award-winning client service, transformational technologies and innovative product solutions combine to deliver exceptional experiences that support our clients' ambitions.

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Sher Gray, Client Services

Accordingly, Steadyhand is driven to provide good, workable funds to its clients in order to provide excellent returns. The model has proven attractive to clients looking for something more tangible and relatable to their own experiences.

“We’d like to have an all-star fund to market our firm, but at the end of the day, that isn’t what drives us,” Bradley said. “What we endeavor to do more than anything else is to provide that steady hand and keep people in over the long term, and so far we’ve done that.”

Economic experience

It is also interesting to note that, while Steadyhand is celebrating its fifth birthday, the company was formed during the recent economic tough times, yet had virtually no redemptions.

“As people have gotten comfortable with us and understand how we invest, when markets get weak we tend to have a pickup of inflows and people taking advantage of cheaper markets, which is what we advise,” Bradley said.

The recent period – essentially the entire existence of Steadyhand – was economically difficult, yet Bradley believes it proved beneficial, as its impact sharpened the ability of Steadyhand to



David Toyne, Director, Business Development



Scott Ronalds, Research & Communications

work with clients and understand their needs.

Notably, though, the largest impact was on Steadyhand's ability to grow, particularly in its early years. Growth was slowed and returns were impacted. This time allowed Steadyhand to develop the communications end of its model, reaching out to clients and ultimately helping them become better investors.

"Everything is clicking in and our intent is to keep our head down and keep focused on generating client returns," Bradley concluded. "In the last six months, we have really found that there is as big uptick in interest and we have worked hard over our five years to establish some

awareness in our brand, and now our record.

"We are pretty ambitious and we expect to be substantially bigger. We are growing at a fast rate and we hope that will continue. We are focused on investment philosophy and a limited lineup of funds, with client service and low fees. We have done our groundwork and now it is just continuing to bring it to a broader array of clients." **CBJ**

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