2024 Media Kit

Focused on Your Goals. Invested in Your Success.

scharfinvestments.com

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Strategy, Investment Approach, and a 40-Year Track Record

Scharf Investments is an investment manager and financial advisory firm headquartered in Los Gatos, Calif. in the heart of Silicon Valley. Scharf manages $4.5 billion in client assets, primarily by investing in public equity and fixed income securities. The firm is notable for its long-term performance track record. Scharf recently celebrated its 40th year as an investment manager. The team takes a private equity approach to public market investing with a long-term horizon. If you had invested $1 million in the Scharf flagship equity strategy in 1983, that stake would be worth more than $111 million today. That is impressive performance—even by Silicon Valley standards.

More Potential Gains with Lower Volatility

Scharf Investments utilizes a unique Multi-Factor Analytical Performance (MAP) screen to consistently identify high-quality stocks with sustainable earnings and strong valuations. Our objective is finding the sweet spot of greater upside gains and lower downside risk. For financial advisory teams that share our value system and understand our investment philosophy, we offer investment solutions that are backed by a 40-year performance record.

Our investment process is thorough and comprehensive. Only a fraction of the stocks identified by MAP screens are selected to undergo additional rounds of rigorous research. Even fewer investments are chosen for portfolios, which generally include just our top 25-35 ideas. Since inception, Scharf Investments' Quality Value and Multi-Asset accounts have outperformed their relevant benchmarks.

Scharf Mutual Funds

Scharf Investments is an independent registered investment advisor dedicated to providing the highest quality investment advisory services. The firm has employed a consistent investment approach since 1983 and maintains a limited number of portfolios, favoring quality over quantity. By aligning the interests of employees with those of clients, we believe that Scharf is distinctly positioned to deliver long-term value.

Scharf looks for securities with significant discounts to their valuation as margin of safety, high earnings predictability, and solid growth.

- Launched in 1984, the Scharf Quality Value Strategy seeks to invest in high quality, enduring franchises priced at substantial discounts to fair value.
- The Scharf Multi-Asset Strategy seeks to combine the appreciation potential of equities with the capital preservation and income generation qualities of fixed income and alternative investments.
- The Global Opportunity Fund primarily invests in U.S. and non-U.S. equity securities that the adviser believes have significantly more appreciation potential than downside risk over the long term.

To learn more visit, https://scharffunds.com/

Global Reach

The investment group iM Global Partner, based in Paris, France, made a 40% equity investment in Scharf in April 2019. The Scharf business strategy is to invest in and market the best boutique investment managers from across the world—and connect them with large pension funds, endowments, and foundations.
Scharf maintains a strict focus on valuation, margin of safety, investment flexibility, and long-term perspective. With a dual focus on prudent guidance and capital protection, Scharf Investments works to help secure their clients' financial future. Their time-tested investment strategy aims to reduce volatility and better preserve and grow capital over the long term.

iM Global Partner is a leading investment and development platform focused on acquiring strategic investments in best-in-class traditional and alternative investment firms in the U.S., Europe, and Asia.

To learn more visit, https://www.imgp.com/

Our Clients

Our primary focus with individuals—what we call private wealth clients—is providing customized financial guidance and an exceptional client service experience. Each person and family have an individualized set of needs related to their financial assets, for example, time and investment horizon, need for current income, risk tolerance, number of beneficiaries, life stage of beneficiaries, and tax planning, among others. We build investment portfolios for clients while navigating these variables.

Our mission has always been to add measurable value to a client portfolio over a market cycle. The opportunity to pair our long-term equity performance record with a local organization that is able to offer customized solutions resonates well with many of our clients and it is one of the things clients like best about our organization.

Services

Scharf Investments partners with individuals, family offices, corporations, endowments, and foundations to add measurable value to client accounts over the course of a market cycle. We employ our proprietary MAP screen to help identify securities that we believe have significantly more appreciation potential than downside risk over the long term. Our analysts do further investigating and only companies with the best quantitative and qualitative characteristics are chosen for client portfolios.

Our rigorous methodology judges a multitude of complexities, but the result is very simple:

Your success is our success.

- Wealth Management
- Financial Planning
- Tax Planning
- Estate Planning
- Investment Management
- Mutual Funds

The Scharf Difference

At Scharf Investments, we are passionate about guiding you toward your unique financial goals, whether big or small. Building a relationship with you isn't just a privilege, it's a responsibility we take seriously. Superior service isn't just a promise, it's our mantra. We know that life choices can impact your financial future, so we strive to gain you as a long-term partner, providing you with customized individualized financial planning and strategic investment management. We're committed to seeing your success story unfold.

$4.5B
in assets under management

26 Average Years
of investment experience among portfolio managers

No. 35
CNBC Financial Advisor list of top 100 in 2023

55%
of firm personnel with advanced degrees or designations

40+
years in business

SCHARF INVESTMENTS

Recent Media Mentions

CLICK ON THE MEDIA HEADLINES TO VIEW THE RECENT VIDEO INTERVIEWS.

Eric Lynch Discusses What Higher Interest Rates for Longer Means for Markets

Reuters Market Insight Interview: Recession Risks Are Heightened

Brian Krawez President of Scharf Investments on CNBC's Street Signs

KCAT Talk of the Town: The Scharf Investment Approach, A Qualitative Edge in Value Investing

Brian Krawez on Bloomberg Radio: Stock Picks and Market Outlook

Eric Lynch on Bloomberg Radio Discusses the Magnificent 7

Eric Lynch on "Trading at Noon" in Studio in London

Brian Krawez on Risks Heading into 2024

Eric Lynch on Global Markets: Outlook and Investment Strategies for Global Markets and Expectations for Bank of Japan's Monetary Policy Decision

Eric Lynch on Reuters: Powell Appears to Calm Investors' Nerves...or Not

Building Legacies Together

Imagine the confidence that comes from knowing your friends, family, and colleagues are in good hands financially. Scharf Investments doesn't just manage assets, we build legacies. For more than 40 years, we've helped generations achieve financial peace of mind.

We Give Back

Supporting the local community and its well-being through philanthropy and service is our practice and privilege. We take pride in making a difference locally and nationally.

Community Engagement

SCHARF INVESTMENTS

Meet the Scharf Leadership Team

BRIAN KRAWEZ
President and Lead Portfolio Manager

JASON MARCUS
Chief Operating Officer and Chief Compliance Officer

ERIC LYNCH
Managing Director

DEBBIE ROBINSON
Senior Director of Wealth Management

GABE HOUSTON, CFA
Senior Research Analyst

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