

Simplicity In Investing, The Foundation of the Iron Gate Philosophy

I am often asked how we have managed to have the performance in our All-Cap Value portfolio that we have had over the last 15 years. People want a “secret sauce” or a “hack” of some sort that gives us some kind of unseen power. Really, our process has been very transparent and easy to understand.

I wanted to share with you a video from my partner Brian Hunsaker that walks you through exactly what we do. You’ll see that it’s not complicated or magical at all. Sticking to this process with discipline and not straying from it has been the key to our success.

Enjoy the video.

What We’re Reading

Brett Pattison on CNBC – yes this is a bit of a fun one. Remember last week’s topic regarding advisor fees? Well an article I recently wrote was featured on CNBC just this week. It covers much of what I discussed in the video last week, but you may want to get another look at how fees can impact your portfolio as published on CNBC.

A Timeless Rule Followed By Every Wealthy, Sophisticated Investor. Written by someone that I have done a little business with in the past and someone that I respect, Dan Ferris. He discusses something we absolutely believe in. A rule that people must follow when buying stocks. This fits hand in hand with Brian’s video of the week.

Here's Why Howard Marks doesn't think we're in a Bubble. When Howard Marks talks, we listen. He is on the same level of a Warren Buffett as someone that we respect. We agree with his assessment of the market not being in a bubble. We, like Mr. Marks, are waiting for the euphoria that accompanies "bubble behavior."