

Formula Growth Ltd.

Formula Growth is an independent boutique investment advisor based in Montreal. Founded in 1960 by John Dobson the firm established itself as a leader investing in U.S. growth and emerging market stocks with a small and mid cap bias. With research offices in Montreal, New York and Hong Kong the firm leverages a very stable and experienced investment team. The repeatable investment process and thorough risk management led to strong compounded returns generated over multiple economic cycles.

Founded	1960
Assets	C\$ 800 M
Stratégies	<ul style="list-style-type: none">• Long Short US small and mid cap equity• US small and mid cap Equity Market Neutral• LS China small and mid cap equity• Long only US small and mid cap
Philosophy	<p>Investing in less crowded and less efficient markets leads to superior alpha</p> <p>Strong alignment of interest with our clients meaningfully investing in our own products</p> <p>Ensure continuity of the firm through a clear and tested succession plan</p>
Approach	<ul style="list-style-type: none">• Fundamental research• Bottom up process while remaining macro aware• GARP style with a small and mid cap bias
Dirigeants	Randall Kelly, CEO/CIO

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