Firm Overview

June 30, 2018

Founded: 1980 | AUM: $5.59 Billion | Ownership: 100% Employee-Owned

AUM by Investment Style

- VALUE: 28.8%
- EXTENDED: 32.4%
- ESG/SRI: 13.0%
- MICRO: 9.8%
- CORE: 5.8%
- SELECT: 9.2%
- GROWTH: 0.6%
- OTHER: 0.3%

AUM by Client Type

- SUB-ADVISORY: 21.4%
- PUBLIC: 35.4%
- FOUNDATIONS/ENDOWMENTS: 25.4%
- TAFT-HARTLEY: 9.9%
- OTHERS: 5.1%
- NON-INSTITUTIONAL: 1.5%
- CORPORATE: 1.3%
- DISCIPLINE CONSISTENCY RESULTS

- Small and mid-cap equity specialists
- Intense, bottom-up fundamental research
- Active, long-only security selection
- Centralized research team of industry experts
- Founded by former chemical engineers
- Majority of investment professionals are KCM shareholders

Fundamental Tools

We seek to understand fundamental drivers of the business.

- Industry Drivers
- Return On Invested Capital

Corporate Highlights

- Sales Growth, Operating Margins, Asset Turnover
- Industry-Specific Drivers and Indicators
- Return On Invested Capital

Signatory of:

PRINCIPLES FOR RESPONSIBLE INVESTMENT

DISCIPLINE

CONSISTENCY

RESULTS
We strive to enable our clients to secure their financial objectives through sustained investment excellence—

One stock,
One portfolio,
One relationship at a time.