

ALREADY BEATING THE S&P 500 BEATING THE INVESTMENT RECORD



Certainly, investors watch the performance of their investment portfolios, but what about the overall performance of their investment advisors? Our present economy is a bumpy rollercoaster ride with slow, uphill climbs and stomach-turning drops. It's no wonder that seasoned investors and newbie's alike want to know more about how their advisors' records measure up.

Enter Indira Amladi CFA, CEO of Princeton Ivy Capital Advisors (PICA) in New York City. Amladi has a 17-year track record of 14.15% annualized return, audited and verified by Global Investments Performance Standards (GIPS). She was recently featured in "Forbes" magazine for her investment forecast and strategy. Her fundamental tenet – long-term investing.

Amladi's goal is to beat her own record. PICA's proprietary database uses a scoring system designed with long-term wealth building companies. The most patient investors get the most reward. "The investment industry has deviated to short-term thinking due to its undue focus on

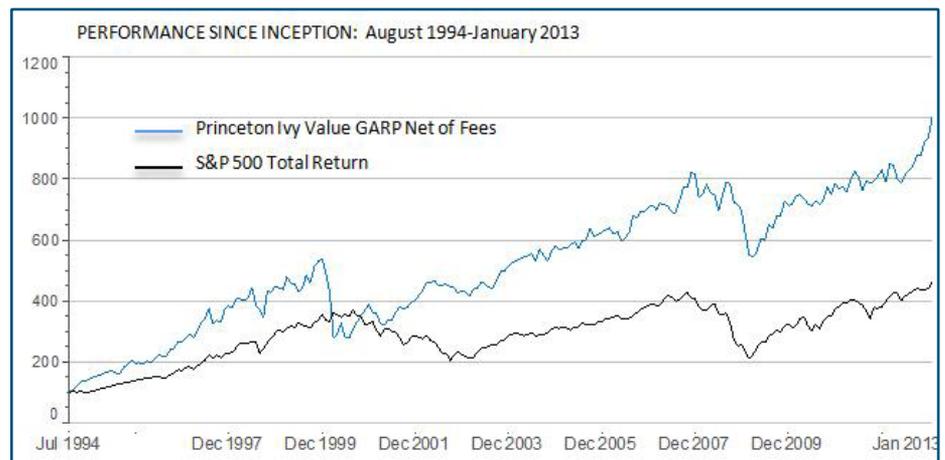
annual return, causing either over-exuberance as we have seen in the dot-com boom, or panic as we have seen in the recent recession," she explained.

Amladi, who refers to the stock market as "mass hysteria," says that in the long run, the index is extremely beatable. And that's why she prefers an alpha paradigm of investment to beta. "A few strong companies are better than the many mediocre companies of the S&P 500 that will catch a cold every time Europe sneezes," she said. It is possible to get returns from a few strong, steady shareholder wealth building companies while still getting a high alpha.

Addressing additional current financial trends, Amladi says that investor demand for liquidity rose after the mortgage crisis and drove the development of specialized hedge fund products, including managed accounts and exchange traded funds (ETF). While acknowledging the convenience of ETF's, she warns they encourage a "day-trading attitude."

On increases in capital gains and dividend taxes, Amladi explains that they support a long-term investment strategy. Through unrealized capital gains, potential tax payments that would be claimed from realized gains are instead transferred and converted into client wealth. And, what about the short-term market panic over the fiscal cliff? Amladi doesn't flinch. "It is a mouth-watering opportunity to buy strong company stocks at lower prices."

Prior to starting PICA, Amladi spent 17 years with consumer companies such as Procter & Gamble, Johnson & Johnson, and Kraft Foods, performing volume forecasting modeling across several product categories. This gave her a big picture view of company cultures and different approaches to growth. These insights are the foundation for her innovative investment strategy which today has brought her national recognition. Very impressive for a newlywed who left India in 1988 and came to the U.S. "with two suitcases and a dream." ■



80 Broad Street 5th Floor, New York NY 10004.

www.princetonivy.net