

Building a Framework for an All-Weather Portfolio



Allen Bond, CFA, Managing Director, Head of Research and Portfolio Manager, Jensen Investment Management

Modern markets are rife with risk and uncertainty as investors are set to grapple with global macro concerns, the Federal Reserve's rate hike regime, and where the Covid-19 pandemic goes from here. While investors are migrating to safety assets like gold and bonds, equities can still be an option when carefully identified and properly structured to play the long game. Join Allen Bond, CFA will discuss different approaches to constructing an all-weather equities portfolio designed with capital preservation in mind.

Allen Bond, CFA, is a managing director, portfolio manager, and head of research at Oregon's largest independently owned asset manager, Jensen Investment Management. A former president of CFA Society Portland, Allen has a passion for quality investing and education. He is responsible for coordinating fundamental research across the Jensen Quality Growth, Jensen Quality Value, and Jensen Global Quality Growth strategies. On weekends you may find Allen cheering on his daughter at the soccer pitch, coaching his son's basketball

team, or out for a long run enjoying the seasonally elusive
Oregon sunshine.