

CASE STUDY

CONCISE ASSET MANAGEMENT

In 2007 CVC provided seed funding to the management team of Andrew King, David Parr and David Grace to establish the boutique Australian Funds Manager Concise Asset Management.

We saw the strength of the management team, with their investment, management and marketing skills honed at previous investment firms, as a compelling proposition.

The team specializes in Australian Mid Cap Equities with a value investment style, with bottom-up fundamental research at its core, and with a mix of institutional and retail clients.

We provided a blend of equity, working capital and initial portfolio commitment which allowed the team to demonstrate investment performance, gain research acceptance and in turn acceptance on investment platforms and portfolios.

The first 5 years saw Concise grow from managing less than \$5 million to over \$100 million, and Concise now manage in excess of \$800 million.

“Sandy has shown support and guidance across all facets of our business since we started in 2007” said David Parr, CEO of Concise.

Having firmly established itself Concise continues to pursue multiple opportunities.

CONCISE
ASSET MANAGEMENT



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