Cambridge Update: Our Pursuit of Continuous Improvement

Stephen Groff, Principal and Portfolio Manager
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At Cambridge Global Asset Management (“Cambridge”), the vast majority of our time is spent analyzing companies. A common trait found at many of the best companies is a strong culture that is underpinned by a desire to continue improving. In today’s highly competitive world, if you stand still, you’re actually falling behind.

What makes Cambridge such an interesting (and at times challenging) place to work is the group of people that make up the team. It is a group of highly motivated individuals who want to keep getting a bit better each day, and we are each pushed by our teammates to be our personal best.

In the spirit of keeping our clients informed, we thought we would share a few of the things the team has been doing to get better — all with the goal of driving investment excellence and adding value to clients.

Utilizing Behavioural Analytics Software to Improve Decision-making

We have signed up with a leading behavioural analytics firm to better understand how we can continuously optimize our investment decision-making. This involves capturing historic trading data, monitoring personal behavioural surveys and other insights, and using advanced analytics/AI to determine patterns in behaviour, with the objective of uncovering biases to drive better investment outcomes. Cambridge is the first and only firm in Canada using this highly advanced tool, and it has provided some very interesting insights. This is a project that we have been testing for some time now, and we have recently started to get insights from the input. This has been an area of focus for Brandon Snow, and the team is certainly benefiting from these new analytics.

Getting Rid of Internal Emails

Find yourself spending far too much of your day getting through emails? You are not alone. With the volume of emails continuing to rise, we wanted to find a more efficient way to communicate internally, store information and monitor each other’s progress. Following the hard work of Jordan McNamee, we shifted everything over to two simple programs that save the team countless hours and is far more effective. This was not an easy transition, but it has been well worth the effort.
Integrating New Members into the Team

We continuously build the right capability and culture. As you recall, we added three new members to the team earlier this year (Charles Morison, Oliver Shao and Sonia Mahadeo). Six months later, they are now well integrated and contributing to our Canadian Equity, Global Equity and investment communication teams, respectively. They are all off to a great start, having brought fresh perspectives and a strong work ethic with them.

On the Hunt for Top Talent

The Cambridge team is working hard and progressing in finding additional analysts to support our Global Equity team. At last check, we are down to our eight finalists (from an initial group of 1,052). We are hopeful the final round for these individuals goes well! We are grateful to have come across many excellent candidates from a global reach, and we are humbled by the strong interest in joining our team.

Set a New Round of Objectives for Each Team Member

We recently completed the half-year review of each team member. Each team member sets challenging new goals every six months, allowing our people to focus on the highest value-add activities. Goals are reviewed and set in January and July, and are developed with the purpose of adding value to our clients. Importantly, the achievement of these next set of goals helps to make Cambridge stronger. While there’s a vast array of goals that come out of this process, examples of an objective for an equity analyst could include analyzing a new industry, identifying specific high-quality business models, and researching specific businesses and recommending an actionable investment opportunity.

We have several more projects in the works, and we can’t wait to share our plans for the future with you. As investors in Cambridge funds, what you are really investing in is the Cambridge team. We hope sharing insights on how the team is adopting practices to continuously improve was insightful and inspires you.

Thank you for the continued support.

Stephen Groff
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