

CONSERVATIVE TOTAL RETURN



Piton Taxable
Short Duration

Piton Taxable
Intermediate Duration

Gain Access to Institutional Quality Fixed Income Management Investment Grade Fixed Income Strategies

If you are interested in general diversification and total return, Piton's short and intermediate durations may be a solution. Our team trades directly in the market, meaning working with us gains you access to both a myriad of fixed income opportunities and the knowledge of our industry experts without excessive markups.

Our Conservative Total Return Strategy Is Focused On



Diversification



Income generation



Capital preservation



Tax-advantaged solutions

Preservation of Principal & Liquidity

Taxable Short Duration Strategy

Assets: Government Bonds, Corporate Bonds, Taxable Municipals

Target Maturity: 0-5 year bonds

Target Duration: 2.5 years or less

Target Credit Quality: AA-A

Portfolio Metrics and Characteristics

Quarter End Portfolio Yield: 3.75%

Current Portfolio Duration: 2.08

Current Avg. Credit Quality: AA

The Portfolio Yield shown above represents current gross Yield to Worst. It should not be assumed that any investment strategy will prove to be profitable. The information provided herein including investment yields, current durations and average credit quality may be modified at any time without notice. For specific performance results of this investment strategy, please [click on the link](#) which will provide you with the most current information. This document shall not constitute an offer to invest and should not be relied upon in making any investment decisions. The information contained herein is for use by the intended recipient and cannot be reproduced, shared or published in any manner without prior written consent. See Piton Investment Management's ADV Part 2 for more information.