

Research Team

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*Years of experience

Heckman Global Advisors provides research subscriptions and advisory services to institutional clients related to global and international equities. It is a division of DCM Advisors, LLC, an SEC registered investment advisory firm established in 2001.

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Research Description

Heckman Global Advisors (HGA) has been providing investment recommendations on equity allocation across countries, sectors and industries based on a disciplined approach since 1993. Recognizing the importance of top-down global equity allocation for international portfolio performance, we provide clients with timely research and investment recommendations. Our research is utilized by premier institutional asset managers, including long-only equity managers, global asset allocators, and funds of funds.

Our team is comprised of experts focused on country allocation and sector/industry allocation globally. All country allocation publications make actionable recommendations based on time-tested models incorporating a group of proprietary valuation, growth, risk, and momentum/sentiment investment indicators. We also offer interactive allocation software that allows clients to create customized models to inform their investment processes.



Vijay Chopra, Allison Hay, and Leila Heckman

Heckman Global Advisors Research

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Research Products

Country Allocation Publications

All country allocation publications make actionable recommendations based on time-tested models incorporating a group of proprietary valuation, growth, risk, and momentum/sentiment investment indicators.

- The **All-Country Equity Allocator** provides country allocation recommendations with the goal of enhancing the returns of All-Country equity portfolios, including both developed and emerging markets.
- The **Global Investment Outlook** provides country allocation recommendations with the goal of enhancing returns of developed market equity portfolios.
- The **Emerging Market Equity Allocator** provides country allocation recommendations with the goal of enhancing returns of emerging market equity portfolios.
- The **Frontier Markets Equity Allocator** provides country allocation recommendations for the frontier markets.

Sector Allocation Publications

- The **Global Balancing Act** provides allocations across six developed regions and ten sectors. Here again, the time-tested model incorporates at the sector region and sector level valuation, profitability/growth, risk and sentiment/momentum factors.
- The **U.S. Balancing Act** provides U.S. industry rotation, allocating across 60 U.S. industries based on our investment factors, including valuation, growth, earning quality, risk and momentum.

HGA Interactive Models

- **HGA Interactive Models** can be customized easily to meet clients' needs. Clients can use the models to test investment indicators across countries or sector/industries, change weighting on investment indicators, and create their own models. HGA works closely with clients in the customization.

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