

**Carronade Capital Partners**

**Company White Paper**

Confidential — For Accredited Investors Only

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## 1. Company Overview

**Company Overview Carronade Capital** is an international investment advisory firm headquartered in Connecticut, USA, with an additional office in Colorado. The firm is powered by a diverse team of approximately 200 professionals, operating with a commitment to rigor, stability, and a client-centric service philosophy.

As of today, Carronade Capital manages approximately **USD 37 billion in assets**, serving a wide range of clients including high-net-worth individuals, family offices, business owners, and institutional investors. With strong research capabilities and forward-looking strategic insight, the firm has established offices across North America, Europe, and Asia, building a global service network that delivers wealth management and investment solutions from a worldwide perspective.

In line with its global expansion strategy, Carronade Capital is actively advancing into overseas markets, particularly Europe. By building localized teams and integrating cross-border resources, the firm continues to enhance its service capabilities and help clients capture international investment opportunities. With its global footprint and deep local expertise, Carronade Capital is committed to helping clients achieve **wealth preservation and long-term growth**, while maintaining industry leadership in **risk management and value creation**.

## **2. Management Team**

**Derrick Evans, Chief Investment Strategist at Carronade Capital Partners**, has over 20 years of international experience in financial markets and asset management. He specializes in macroeconomic research, asset allocation, and cross-border portfolio strategies, leveraging quantitative models to deliver consistent, risk-adjusted returns. Currently managing over USD 5 billion in diversified portfolios, he advises institutional clients and family offices worldwide on long-term capital growth.

**Elena Mayer, Senior Investment Advisor at Carronade Capital Partners**, has over 7 years of experience in wealth management and investment banking. She specializes in global asset allocation, equities, fixed income, and alternative investments, with strong expertise in risk management and cross-border wealth planning. Currently advising more than 120 high-net-worth clients and institutions, she has consistently driven portfolio growth and delivered sustainable long-term returns.

Carronade Capital Partners maintains a robust corporate governance structure with an independent Compliance Committee and Investment Committee to ensure transparent and fully compliant operations.

## **3. Investment Strategy**

Carronade Capital employs a combined **top-down and bottom-up**

**approach**, emphasizing a balance between **value investing** and **growth investing**. Our asset allocation covers U.S. equities, European markets, and emerging market stocks, complemented by bonds and alternative assets to diversify risk.

We conduct regular macroeconomic and sector trend analyses and dynamically adjust portfolios accordingly. Risk management measures include **pre-defined stop-loss levels and maximum position limits** to safeguard client assets.

#### **4. Risk Disclosure**

All investments carry inherent risks, including but not limited to **market volatility, credit risk, and liquidity risk**. Past performance is not indicative of future results. Investors should fully understand and accept the potential risk of principal loss.

Carronade Capital mitigates risk exposure through a **multi-layered risk control framework** and strictly complies with investment restrictions and regulatory requirements.

#### **5. Products & Services**

- Customized Managed Accounts
- Periodic Portfolio Reporting
- Investment Education & Market Insights
- Dedicated Client Advisory Support

## **6. Compliance & Legal Disclaimer**

Carronade Capital strictly complies with **SEC regulations** and other applicable laws to protect client privacy and the security of client funds.

This white paper is **for informational purposes only and for accredited investors**. It **does not constitute an offer, solicitation, or recommendation to buy or sell any securities**. All investments involve risks, and investors should exercise caution.

## **7. Contact Information**

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