

KOPP STYLE PROFILES

Kopp Investment Advisors offers a range of equity investment styles. Blended portfolios combine our two main styles: Emerging Growth and TQM. Portfolios are reviewed regularly and rebalanced when appropriate.

The Emerging Growth style is focused on the potential for growth. Technology and Healthcare are two key sectors we believe have the growth to power a high potential portfolio. Emerging Growth companies are generally small-cap, often in the same or related market sectors, subsectors or industries. The pursuit of high potential returns may result in periods of high volatility.

Emerging Growth
100% Emerging Growth

TQM Blend
30% Emerging Growth
70% TQM

Balanced Blend
50% Emerging Growth
50% TQM

Emerging Blend
70% Emerging Growth
30% TQM

Blended portfolios provide diversification across market capitalization and investment styles. At different times, market results may vary because of company size, investment style or economic sector holdings. A blended portfolio includes stocks chosen from a wide range of sizes and sectors with investment appeal for a variety of reasons from a special technology advantage to products with a high customer perception of quality. A blended approach offers a mix which can provide meaningful upside while tempering the portfolio volatility by holding stocks that do well at different times and under different market conditions.

TQM
100% TQM

TQM stands for Total Quality Management. Kopp Investment Advisors believes Quality will provide an investment advantage. S&P 500 companies are graded relative to their peers based on their successful use of Quality as they strive to gain a competitive edge. TQM portfolios invest in the highest scoring companies from a cross section of economic sectors and industry groups in the S&P.