



# BondSavvy®

Investing in most bond funds is like sticking money under your mattress.

Bond funds are overdiversified and generate weak returns. **Investors deserve better.**

*We founded BondSavvy to empower you to invest in individual corporate bonds and increase your returns.*

Start benefiting from the advantages individual corporate bonds have over bond funds:

Higher Potential Returns

Lower Fees

Investments That Better Match Return Objectives

Payment of Fixed Coupon

Own What You Want at the Price You Want

More Transparency

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# STRONG RETURNS AND SAFETY

Corporate bonds are a compelling alternative to bond funds *and* stocks.

## But which bonds should you own?

Our **fresh approach** to bond investing identifies corporate bond investments that can **outperform** the market.

### AIM HIGH

We recommend bonds that can appreciate in value and achieve returns higher than bond funds and, at times, stocks. We also have achieved higher *after-tax* returns than muni bonds.

### FIND VALUE

Credit ratings don't tell you whether a bond is a good value. Our analysis uncovers bonds trading at compelling values relative to their risk.

### BE SELECTIVE

We have strict investment requirements that only a small number of bonds fulfill. Focusing investments on these bonds helps individual bond investors outperform overdiversified bond funds.

### SELL BEFORE MATURITY

We often recommend selling bonds *before* maturity to lock in gains and increase returns.

### GET IN CONTROL

Individual bonds are more transparent than bond funds since you know exactly what's in your portfolio. Many bond funds turn over 300+% annually, adding costs, reducing returns, and ensuring you never truly know what you're investing in.



Let BondSavvy be your corporate bond investing partner.

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# BOND INVESTING MADE SIMPLE

Many believe bonds are too complicated. We are here to change this.

BondSavvy presents new investment recommendations during **The Bondcast**, a subscriber-only webcast where we discuss our investment rationale for each bond and issuing company. We then update our recommendations, including if and when a prior pick becomes a 'sell.' Subscribers have access to all prior and new investment recommendations.



**We recommend investment-grade *and* high-yield bonds.**

All you need to do is review the recommendations and decide which bonds fit your portfolio. Customers subscribe to **BondSavvy** to gain access to our recommendations. You keep your existing broker to execute trades and hold your assets.

## BondSavvy by the Numbers

**10**

Number of annual subscriber webcasts where we present new recommendations, update prior recommendations, and host 'Office Hours' Q&A

**22+**

Years of experience BondSavvy's founder has in financial analysis and financial markets

**80%**

Through January 31, 2020, the percentage of exited BondSavvy recommendations that beat the benchmark iShares bond ETF

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# ABOUT OUR FOUNDER



**STEVE SHAW** founded BondSavvy to put the power of corporate bonds into the hands of individual investors. His sole focus is individual corporate bonds where he has achieved returns that exceed bond funds and, often times, the stock market.

Steve is a former investment banker, corporate mergers-and-acquisitions executive, and senior executive of two leading bond e-trading companies. He uses his 20-plus years of experience across financial analysis and capital markets to identify undervalued corporate bonds that can drive strong total returns.

## CONTACT

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*- Steve Shaw*

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