



Rising Sum

Harnessing the power of value investing



“Price is what you pay.
Value is what you get.”

Warren Buffett

Building on Buffett’s model

Successful investing is a blend of art, science and luck. Although chance will always play a part, your prospects as an investor are vastly improved if you adopt a proven strategy.

And when it comes to strategies, few have had more conspicuous success than value investing. Warren Buffett, the greatest exponent of the technique, has consistently outperformed the market by following his legendary acquisition criteria. Today, the ‘Sage of Omaha’ has a net worth of more than \$50 billion. That’s no accident.

Introducing Rising Sum

At Rising Sum, a provider of investment technology, we are following Warren Buffett’s lead. Moreover, we have taken his winning formula one step further and created a platform at risingsum.com that rigorously and systematically applies the fundamentals of his approach.

Call it a marriage of art and science. By combining the principles of value investing with our screening technology, we give you unique investment insights and understanding. It’s a highly focused view, one that penetrates a welter of data and brings the underlying potential of companies directly to your screen.

What lies beneath?

We provide market knowledge to identify true (or hidden) value. This will guide your investments and help you make informed decisions. In short, just like Warren Buffett, you will be equipped to outperform the market.

In developing the platform we have examined the needs of online investors and financial advisers. We have looked closely at how they pick stocks and we have reviewed the strengths and weaknesses of current tools and techniques.

As a result, Rising Sum sees through the blind spots in today’s complex financial landscape. It’s a platform for those who want to harness the power of value investing and profit from what other investors miss.

Finding hidden value

While there are many stock screeners, only Rising Sum is precisely calibrated for value investing. It collates quantitative and qualitative data and presents a comprehensive profile of investment opportunities in the equities marketplace.

The starting point is Berkshire Hathaway’s acquisition criteria:

- Large purchases (with at least \$50 million of before-tax earnings)
- Consistent earning power
- Good returns on equity and little or no debt
- A simple business proposition
- Sound management
- An offering price

With Rising Sum you can screen entire indices and find companies that demonstrate historical and fundamental data consistency, or improvement, over time and key ratios.

You can also build and save your own custom screening models, tailoring the technology to individual investment styles and goals.

So, what’s the secret to unlocking hidden value? You’ll find it in Rising Sum’s proprietary AlphaSlope indicators and Value Barometers, discussed opposite.

Who is Rising Sum for?

Rising Sum is designed for financial institutions, money managers, independent financial advisors and independent investors.

If you’re looking for the latest screening technology to maximize the strength and potential of value investing, our platform will add a powerful new dimension to your analysis and investment decisions.

AlphaSlopes & Value Barometers

Using Rising Sum’s AlphaSlopes and Value Barometers, investors can apply the Berkshire Hathaway model to:

- Identify companies that demonstrate consistent performance
- Identify companies that are undervalued
- Create graphs that show data based on up to 10 years of performance
- Identify companies with the potential to improve performance

By showing more historical data than other screeners, we allow investors to spot where the real value lies.

When applying AlphaSlopes, you can measure a company’s performance over time and determine consistent earnings and returns on equity. Then, together with Value Barometers, you can build up an overall picture by assessing margin of safety and intrinsic value.

Intrinsic value

This is the difference between book price and potential value – and it lies at the heart of value investing and the Rising Sum platform. By following AlphaSlopes and Value Barometers for chosen companies, you can test their intrinsic value across different timeframes and criteria. Then, armed with this fundamental data, you can pick undervalued stock.

Quality control

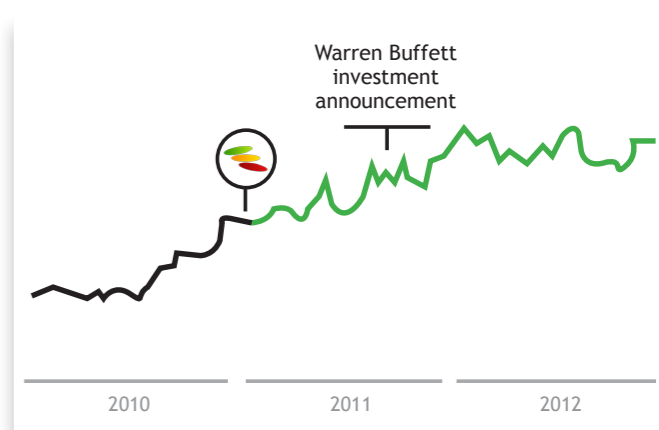
While AlphaSlopes and Value Barometers provide quantitative analysis, Rising Sum brings you qualitative analysis through regular Value Reports that profile the top screening results.

Adding more value

We also provide Value Alerts, which are real-time bulletins on developments such as earnings published outside market hours. The alerts ensure that you receive the right information to respond to material events.

Rising Sum in action

Rising Sum identified both Lubrizol and IBM as value investments before Warren Buffett paid \$20 billion for them. It can do the same for you, providing the vital investment edge and market insights that mean the difference between loss and gain.



Find out more: visit risingsum.com and see how we can help you to beat the market – and maybe even Buffett himself.

Find the value that others miss...

