

Three Pillars for Outperforming the Markets



Anacapa Advisors



Our firm started off with a bold wager against conventional wisdom. Warren Buffett famously once said that no active manager could beat the market over a 5-year period... and his long-time partner Charlie Munger agreed. When our founder Phil Pecsok took Munger up on that challenge, Anacapa Advisors was born. In the process, we identified a major gap in the market: the need for a strategy rooted in discipline and confidence. And that's exactly what we set out to provide.

Today, the investment landscape often focuses on minimizing risk as the ultimate goal – but we know there's a better way. Ultimately, the objective should not be to avoid risk at all costs; it should be to embrace the right opportunities and generate meaningful returns from them.

Strategies such as market-neutral and long-short equity inherently limit upside potential. They're built on the premise of hedging risk - but in doing so, they also hedge against opportunity. We don't believe in diluting returns with overly complicated systems that aim to outwit the market. Instead, we believe in participating in the market's natural long-term growth.

With that said, our approach has generated outsized returns for our investors. We have two funds, Anacapa Alpha and Anacapa Quantum, both of which have consistently been ranked in the top 1% of all US Equity funds reporting on Bloomberg. We have achieved these results by staying true to our philosophy: own the best, stay invested, and build trust for the long-term.

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Own U.S.,
Own the Best

Stay Invested for
the Long-Term

Build on Trust and
Transparency



Own U.S., Own the Best

Our belief is simple: to own the best U.S. stocks and generate alpha while doing it. The U.S. market has long been a global leader in innovation, financial stability, and growth. We focus on businesses with strong fundamentals- those that are leaders in their industries and have the resilience to navigate market cycles. This ensures that we are not just following trends but are following companies with proven track records and clear potential for prolonged success.

Moreover, it's important to recognize that while markets offer tremendous opportunity, the likelihood of achieving double-digit performance year after year is very low. Our emphasis on quality and consistency has landed us among the top 1% of US Equity funds listed on Bloomberg. As of the end of November 2024, and since inception in 2018, Anacapa Alpha has generated a +210% return, outperforming the S&P 500 by 86%. Anacapa Quantum has seen a +239% return, surpassing the Nasdaq-100 by 101% since inception in 2020.

By focusing on high-quality companies, our investors can also avoid the guesswork of stock picking, and our team's expertise is spent on building portfolios that thrive in the real world.

Stay Invested for the Long-Term

Staying invested - even during volatility - is one of the most powerful ways to achieve financial success. Yet, many investors are tempted to react to market noise, often at the expense of long-term results. Additionally, the hedge fund industry often promotes diversification by being uncorrelated to traditional assets - but this comes at the cost of performance.

Our approach is designed for those who want to buy, hold, and let their wealth grow over time, complemented by alpha generation and risk mitigation. Our clients trust us to make informed decisions that keep their portfolios primed for performance.

Build on Trust and Transparency

When you invest with Anacapa Advisors, you're not just buying stocks - you're participating in a proven philosophy. You want to own stocks. You want to stay invested. We make that a reality, helping you boost returns while sidestepping the pitfalls of fleeting trends and unnecessary risk.

We also implement an investor-friendly fee approach, fostering a strong partnership between Anacapa Advisors and our clients as it motivates us to consistently generate returns that exceed your expectations. We work in the best interest of our investors, providing both capital efficiency and the opportunity for superior risk-adjusted returns.

If you're ready to embrace a smarter, more strategic approach to investing, contact us [here](#).

To learn more reach out today

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