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## About Us

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Valuentum (val-u-n-tum) [val-yoo-en-tuh-m] Securities Inc. is an independent investment research publisher, offering premium [equity reports](#), [dividend reports](#), and [ETF reports](#), as well as commentary across all sectors/companies, a [Best Ideas Newsletter](#) (spanning market caps, asset classes), a [Dividend Growth Newsletter](#), modeling tools/products, and more. Independence and integrity remain our core, and we strive to be a champion of the investor. Valuentum is based in the Chicagoland area.

Valuentum is not a money manager, broker, or financial advisor. Valuentum is a publisher of financial information.



**BBB Rating: A+**

As of 9/21/2020

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Brian Michael Nelson, CFA  
President, Equity Research & ETF Analysis  
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Brian Michael Nelson is the president of equity and dividend growth research and ETF analysis at Valuentum Securities.

He is the architect behind the company's research methodology and processes, developing the Valuentum Buying Index rating system, the Economic Castle rating, and the Dividend Cushion ratio. Mr. Nelson has acted as editor-in-chief of the firm's Best Ideas Newsletter and Dividend Growth Newsletter since their inception.

Before founding Valuentum in early 2011, Brian worked as a director at Morningstar, where he was responsible for training and methodology development within the firm's equity and credit research department. Prior to that position, he served as a senior industrials securities analyst covering aerospace, airlines, construction, and environmental services companies.

Before joining Morningstar in February 2006, Mr. Nelson worked for a small capitalization fund covering a variety of sectors for an aggressive growth investment management firm in Chicago. He holds a Bachelor's degree in finance and a minor in mathematics, *magna cum laude*, from Benedictine University. Mr. Nelson has an MBA from the University of Chicago Booth School of Business and also holds the Chartered Financial Analyst (CFA) designation.

### Highlights:

Brian is frequently quoted in the media and has been a frequent guest on Nightly Business Report, Bloomberg TV, CNBC, and the MoneyShow.

Mr. Nelson is very experienced valuing equities, developing discounted cash-flow models used to derive the fair value estimates for companies in the equity coverage universes of two independent investment research firms, including Valuentum.

Brian worked on a small cap fund and a micro cap fund that were ranked within the top 10th percentile and top 1st percentile within the Small Cap Lipper Growth Universe, respectively, in 2005.

Brian led the charge in developing Morningstar's issuer credit ratings, creating and rolling-out one of the firm's proprietary credit metrics, the Cash Flow Cushion.

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Callum Turcan  
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Callum Turcan is Associate Investment Analyst at Valuentum and acts as the co-editor of the firm's newsletters.

Mr. Turcan has been covering the oil & gas markets over the past eight years as a freelance financial writer and analyst. Since graduating at the top of his class from Western Washington University, he has been focusing on discovering long-term value in the energy markets and elsewhere.

Always remember, it's future expectations that matter most, not short-term leg jerk movements in raw energy resource prices.

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Christopher Araos  
Associate Stock and Dividend Analyst  
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Christopher Araos is Associate Stock and Dividend Analyst at Valuentum Securities.

Mr. Araos joined Valuentum in 2015 and helps support a variety of functions at Valuentum, including dividend-related analysis as well as syndication support. Chris oversees simulated newsletter attribution analysis and scours the markets for dividend changes. Mr. Araos assists in Valuentum's quantitative analysis and data methods.

Christopher holds two Bachelor's of Science degrees in Computational Mathematics, Probability and Statistics from Northern Illinois University.

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## About Our Name

*But how, you will ask, does one decide what [stocks are] "attractive"? Most analysts feel they must choose between two approaches customarily thought to be in opposition: "value" and "growth,"...We view that as fuzzy thinking...Growth is always a component of value [and] the very term "value investing" is redundant.*

-- Warren Buffett, Berkshire Hathaway [annual report, 1992](#)

At Valuentum, we take Buffett's thoughts one step further. We think the best opportunities arise from an understanding of a variety of investing disciplines in order to identify the most attractive stocks at any given time. Valuentum therefore analyzes each stock across a wide spectrum of philosophies, from deep value through momentum investing. And a combination of the two approaches found on each side of the spectrum (value/momentum) in a name couldn't be more representative of what our analysts do here; hence, we're called Valuentum.

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