

Marketing manager finds comfort in technology

CATHARINE FENNELL

AGE: 36

OCCUPATION: Toronto-based entrepreneur. (Ms. Fennell is managing partner of marketing boutique *Swing Think Inc.* and founder and president of career marketing company *Market Yourself Smarter*.)

INVESTMENT PERSONALITY

Ms. Fennell uses the term "diversified" to describe her approach. Her pillars are comprised of real estate – "buy great properties, upgrade, move at the right time" – registered retirement savings plans and registered education savings plans – "two kids to put through university" – and investments. On that front, she describes herself as an "aggressive, growth-oriented mutual fund investor."

PERFORMANCE STATISTICS

Her investment portfolio has posted an average annual five-year investment return of 8 per cent, dragged down by her disappointing one-year return of a loss of 7 per cent in 2007. Investment asset class weightings are 80-per-cent equities and 20-per-cent bonds "given the long invest-

ment time horizon."

BEST MOVES

Google, "bought shortly after its IPO in 2004 for approximately \$130 a share," Apple (\$35 in 1999) and Research In Motion (\$67 in 1999). "My businesses are about technology and driven by technology so I am very comfortable in this sector," Ms. Fennell said. "Google, Apple and RIM have protected the portfolio during the recent downturn."

WORST MOVES

Like many investors, Ms. Fennell was overweight technology stocks when the bubble burst in 2000-01.

WHERE I GET MY IDEAS

"My secret weapon is my financial adviser, Larry McCurdy [of CIBC], who has helped me balance my investment approach and develop an asset allocation model that addresses my long-term growth goals, while providing downside protection," Ms. Fennell said. "I follow the business sector fairly closely," she added, noting that one of her companies produces a yearly best employers' study. "My experience is that companies that are



Catharine Fennell is an aggressive, growth-oriented mutual fund investor whose investing hero is Suze Orman. ASHLEY HUTCHESON FOR THE GLOBE AND MAIL

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INVESTING HERO

"I think Suze Orman is great. She tells it like it is and paints a pretty accurate picture of the state of financial affairs in North America. She encourages people to get out of debt and not spend what they don't have. Building wealth is hard, particularly when you are an entrepreneur investing in growing your business and growing your family at the same time."

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