



## PROFILE: Alex Bossert

FOUNDER AND PORTFOLIO MANAGER, BOSSERT CAPITAL

**BOSSERT**  
CAPITAL

Alex Bossert is the founder and portfolio manager of Bossert Capital located in Minneapolis, MN. Bossert Capital manages a concentrated, long-term focused portfolio of thoroughly analyzed businesses using in a bottoms-up approach. Their method is inspired by Benjamin Graham, Charlie Munger, and Warren Buffett. [Bossert Capital](#) focuses on high-quality competitively advantaged businesses with long growth runways that are managed by great management teams. Bossert Capital charges no management fees, only a performance fee after exceeding a 6% annual return with a high-water mark.

Alex began investing in stocks at just ten years old. He used the proceeds from a business he had started to set up his first brokerage account to begin investing in stocks. In middle school, Alex attended his first Berkshire Hathaway Annual Meeting. As a college student, Alex was featured in Forbes and competed against the best analysts on Wall Street to be [ranked in the top 14](#) buy-side analysts by SumZero as his investment ideas had an average return of 52%. Prior to starting Bossert Capital, Alex worked as an analyst at two different hedge funds. Alex founded Bossert Capital in 2017 after being approached by high-net-worth families. Bossert Capital caters to a select group of investors which include entrepreneurs, executives, and family offices.

Bossert Capital approaches investing as a part owner of the businesses they are invested in. The portfolio is focused on a concentrated group of high-quality, competitively advantaged businesses that have exceptional management teams. Bossert Capital has the intention to own many of these businesses for decades. This high hurdle for investment quality naturally means that Bossert Capital runs a concentrated strategy of usually fewer than 10 positions. Bossert Capital makes an investment after conducting an exhaustive bottoms-up analysis purchasing shares only when the business is trading for a large discount to a conservative estimate of intrinsic value. A large margin of safety is required of all investments. This process is rigorous, and few companies meet Bossert's high standards, but when they do, few find a higher quality shareholder than Alex. Bossert invests for the long term, establishing an ownership mindset in the firms he holds.



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