NOVATO, Calif., Jan. 8, 2014 /PRNewswire/ -- Winans Investments posted another strong year as its client base grew 14% (19% in 2012). WI credits this growth to the growing popularity of its unique approach to stock and bond investing.

Winans Investment Separate Managed Portfolio Composite:

Averages

2013:

2012:

5-year:

10-year:

Growth Portfolios

27.5%

8.8%

14.1%

9.2%

Balanced (50/50)

14.3%

8.6%

11.3%

6.1%

Income Portfolios

5.3%

7.9%

11.6%

5.5%

See descriptions and disclaimers below.

More information can be found at winansinvestments.com.

As stated in a recent Forbes.com article written by Winans Investment's President, Kenneth G. Winans ,
"Making money for your clients is more important than being right on theoretical valuations…..Ignoring stock price momentum is a time-tested mistake, and many value investors have paid a steep price for this oversight."

Other Key Statistics:

1. A large percentage of our portfolios have outperformed their benchmarks in a 10-year timeframe, net of fees and commissions.
2. The income portfolios used in the composite were able to outperform the income benchmark by limiting preferred stock investments in the financial sector.
3. The income portfolios had an average annual yield of 8.3% with an average maturity of 4.1 years.

Definitions:

1. Growth Investments - 100% growth oriented mid to large cap U.S. exchange traded stocks
2. Income Investments - 100% income oriented investments (corporate bonds with low duration and preferred stocks)
3. Winans International Statistics – Internal Rate of Return (IRR-ROI) net of investment fees and transaction costs.

The results portrayed relate only to a select group of WI's clients and excludes:

1. Accounts opened for less than 12 months
2. Portfolio size is less than $50,000 as of the year-end balance.
3. Clients have changed their investment goal and asset allocation by greater than or equal to 11% during at year-end or a 25% variance.
4. Net deposits and withdrawals are greater than or equal to 25% of the year-end balance.
5. Client selected investments are greater than or equal to 10% of portfolio at year-end.
6. Clients have placed restrictions on the investment activities of WI at any time during year.
7. Winans International retirement plan and employee and employee spouse accounts.

Disclosures: Benchmark performance for each portfolio category is based on the strategic weightings described above and differ from actual weightings of client holdings during the period displayed. Client portfolios included in each portfolio category are based on client's stated investment strategy and not on actual asset class weightings within each client's portfolio. The volatility of each benchmark may be materially different from that of the investment portfolio. The percentage of clients outperforming their benchmark may be less than shown if benchmark weightings were adjusted to reflect actual client asset weightings over the same period. The Difference % in performance between WI Net Return % and Benchmark % may be less than shown, or negative, if benchmark weightings were adjusted to reflect actual client asset weightings over same period. Past performance should not be taken as representative of future results. A portfolio's performance is a simple or straight average of the time weighted performance of the client portfolios included in each portfolio category and do not meet the requirements of an GIPS track record. The portfolio performance presented may be materially different if using an asset-weighted average of the client portfolios' performance included in each portfolio category. The information supplied and the formula calculations used are considered reliable but cannot be guaranteed. Information supplied can change without notice. The performance results portrayed reflect the following: the deduction of expenses paid by the client during the period shown; and, the reinvestment of dividends, capital gains, and other earnings when appropriate (such may be invested in a money market fund or other cash equivalent pending reinvestment). The results portrayed may be materially different if excluded accounts were otherwise included in the performance presented.

Additional information is available upon request at www.winansinvestments.com

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