



Focused Stock Picking in Short-Term Noise

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In the midst of headline news focused on signs of an economic slowdown, political gridlock in the U.S, and concerns about trade negotiations with China, many investors are struggling to stay hopeful. But William Blair Large Cap Growth Fund Portfolio Managers Jim Golan and David Ricci tell *Financial Advisor* they're more focused on the business of picking stocks.

"A lot of what we're hearing is short-term noise," Ricci told *Financial Advisor*. "Our focus remains on investing in long-term winners. The stuff we're hearing about now washes away over three to five years."

The portfolio they manage focuses on high-conviction names and while some companies are well known among its peers, Golan and Ricci also invest in some less obvious growth stories.

"We go beyond the Amazons of the world to large-cap names a lot of people haven't heard of," says Ricci. "Our alpha comes from stock selection, not sector bets." Ricci and Golan share their insights on several of these large-cap companies in the *Financial Advisor* article.

[Read David Ricci and Jim Golan's Financial Advisor interview](#)

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