Frequently Asked Questions

What is your story?

Allan Pankratz, president of Ballantyne Capital, draws from over two decades of experience working at several large financial institutions. His journey led him to the realization that "big-firm" investing was not aligned with his values. Over time, he found that the boutique business model provided the autonomy he sought to build a company that would ensure the needs and interests of its clients remained paramount.

The firm's strength lies in the cohesive leadership of our co-founders.

Martin, our firm's Chief Operating Officer, boasts over thirty years of investment industry experience in operations and information technology. His background includes a decade at Canada's largest asset manager and successfully founding a project management company serving wealth management firms. Martin and Allan first collaborated during this period and formed a strong business relationship, which laid the foundation for their company.

Who are you, and what do you believe in?

We are a Vancouver-based investment firm specializing in North American equities. We provide discretionary investment management services to high-net-worth individuals, families, and business owners. We believe boutique investment firms like ours are a strong alternative to bank-owned firms. One key difference is that there is often better alignment between the firm and its clients' long-term interests. For example, Ballantyne's investment professionals manage their own money alongside their clients and invest capital in the firm.

As both owners and clients, we treat our clients the way we would like to be treated.

How do you think about investing?

Our philosophy, rooted in understanding the major forces that drive the market over a full cycle, guides our investment approach. We analyze monetary and economic conditions, earnings growth, valuations, investor sentiment, and technical market indicators. Monetary conditions, such as the amount of liquidity in the system, are the most important as they drive the market's long-term direction. As prudent stewards of our client's wealth, we take pride in our expertise, track record, and investment philosophy, which help our clients meet their long-term investment objectives.

Our core mission is unchanged: to create long-term value for our clients.

What is your investment strategy?

We strive to deliver consistent, risk-adjusted returns for our clients while prioritizing their unique investment goals. We follow a disciplined research and data-driven investment approach focusing on long-term value creation. Our investment goal is to build a diversified portfolio of Canadian and U.S. securities with superior three-to-five-year return potential. We invest in companies demonstrating 'growth at a reasonable price' known as "GARP" and incorporate an effective buy-and-sell strategy. We believe a more concentrated and non-benchmark portfolio will achieve appropriate risk-adjusted returns. Our clients' portfolios typically comprise 40 to 50 securities, with an annual turnover ranging from 5 to 15 percent.

Investing with conviction

Why should I deal with you?

We have successfully provided professional money management services to clients in a wide range of market conditions. Our strong track record validates our prudent approach and long-term perspective. By prioritizing individual, separately managed accounts over pooled or mutual funds, we demonstrate our commitment to transparency, tax flexibility, and customized solutions for our clients. Our size allows us to stay nimble, quickly take advantage of opportunities, and provide attentive and responsive client service.

What is the boutique advantage?

While large financial institutions, such as banks and life insurance companies, continue to dominate the Canadian investment landscape, there is growing momentum for a different investment experience. Enter the boutique firm concept- a growing, thriving independent business model that provides personal contact, local connection, and a client-centred investment focus. Many investors appreciate a boutique firm's specialized knowledge, personalized service, and entrepreneurial approach. These factors contribute to a positive client experience and lead to long-lasting relationships.

Let's talk

We look forward to hearing from you.

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