

DIAMOND HILL

INVESTED IN THE LONG RUN

# Our culture

One team aligned for our clients,  
teammates and communities



# Why our culture matters



## **Our vision**

To be the leader in outstanding client partnerships built on exceptional results.



## **Our mission**

To invest with conviction using our valuation-disciplined investment principles and client-aligned model.



## **Our promise**

To be champions for the long-term success of our clients and to exceed expectations in every aspect of our business.

# Our culture is designed to...



# Clients are our #1 priority

## Portfolio Management

Our investment capabilities are designed to deliver excellent long-term investment outcomes.

## Investment Principles

Our investment teams share a core set of investment principles.

## Alignment of Interests

We align our interests with those of our clients to remain focused on delivering client outcomes.

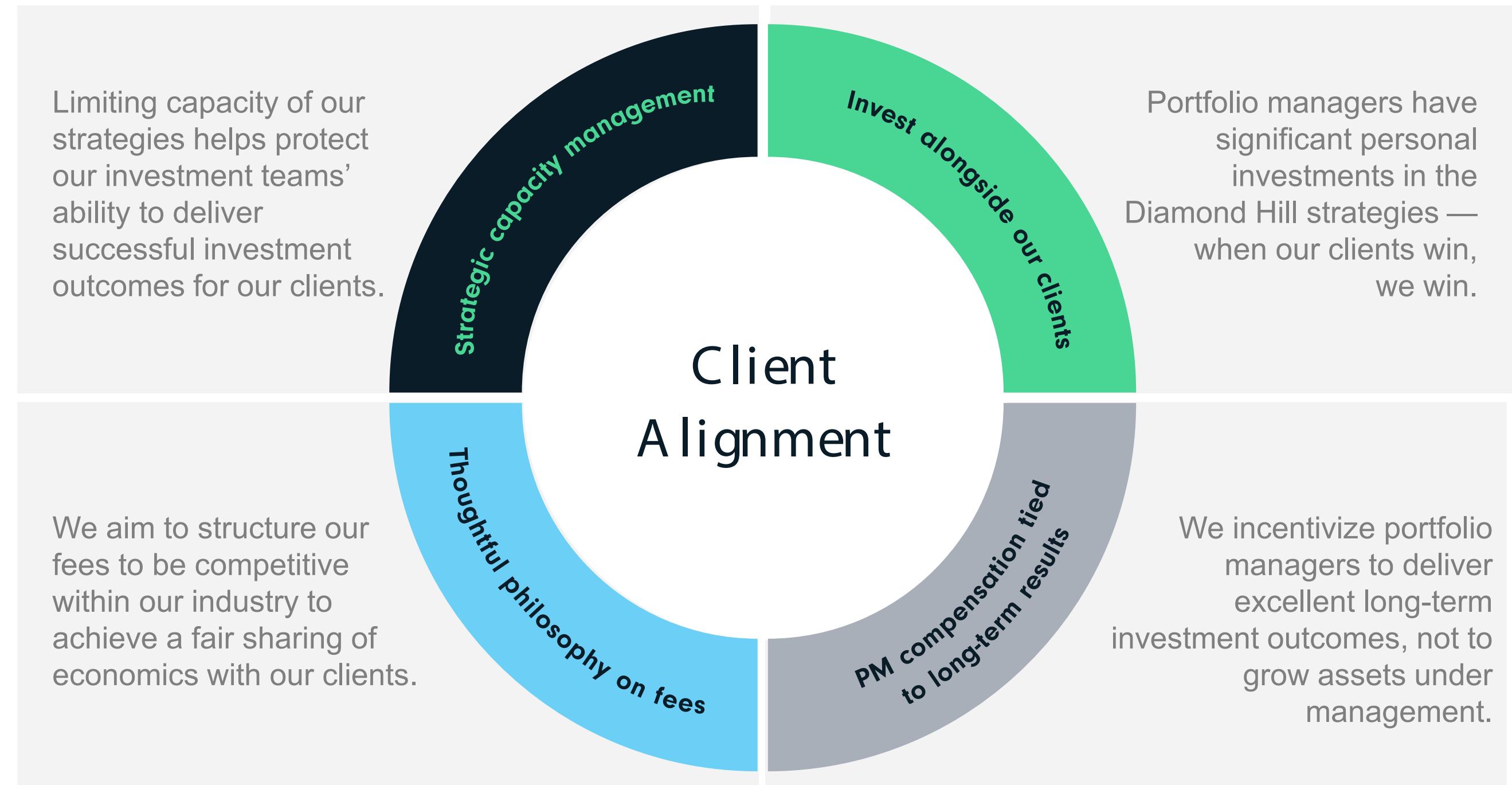
## Centralized Infrastructure

Our centralized operations and client teams collaboratively support our investment teams and our clients.




# Alignment of interests

Our client centric approach helps us minimize conflicts of interest to ensure we are singularly focused on delivering client outcomes.



# Our core values

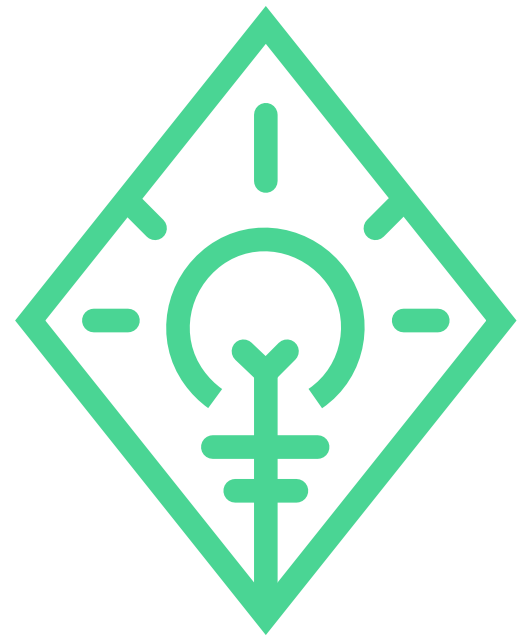


**“It’s not hard to make decisions once you know what your values are.”**

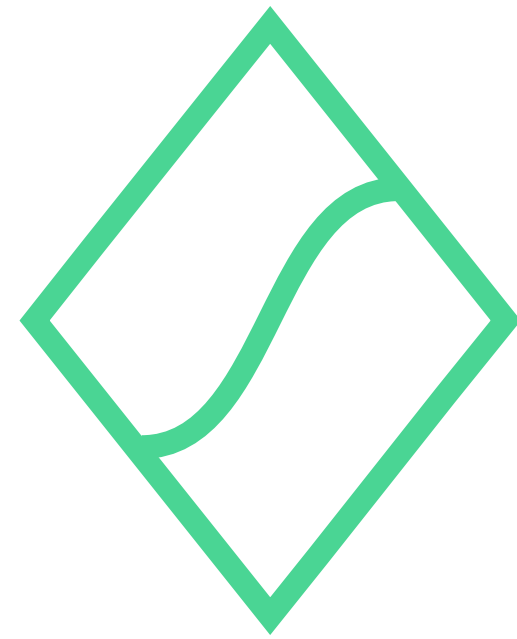
**Walt Disney**

Acclaimed animator, film producer and entrepreneur.

# Our core values



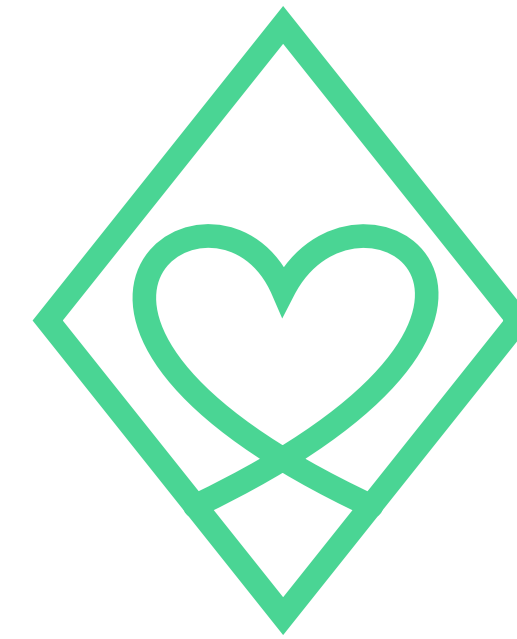
**Curiosity**



**Ownership**



**Trust**



**Respect**

“There is no respect for others without humility in one’s self.”

**Henri Frederic Amiel**


Swiss philosopher, poet and critic.




# Curiosity — What it means to us



Focus on continuous improvement



Be open minded and seek different perspectives



Have a life-long passion for learning

**“Being curious means seeking out the answers you look for and not expecting those answers to come from someone else.”**

**Harsh Acharya, CFA**  
Research Analyst




# Curiosity How we live it

- ▶ Weekly education sessions and firm wide town halls
- ▶ Career development and certifications
- ▶ Deep fundamental investment analysis
- ▶ Video learning library
- ▶ Go beyond surface level assumptions




“The mind that opens to a new idea never returns to its original size.”  
Albert Einstein


# Ownership — What it means to us



Think and act  
like an owner



Embrace a  
long-term mindset



Lead by  
example



Own our  
outcomes

**“When you think and act like a business owner, you naturally embrace a long-term mindset.”**

**Heather Brilliant, CFA**  
Chief Executive Officer



# Ownership How we live it

- ▶ New hire stock grant and ongoing ownership opportunities
- ▶ Long-term approach to investing and business management
- ▶ Evaluate investment results over rolling 5-year periods
- ▶ Build long-term client relationships
- ▶ Empower our associates to act and make a difference



**“Responsibility equals accountability equals ownership. And a sense of ownership is the most powerful weapon a team or organization can have.”**

**Pat Summitt**  
NCAA Women’s Basketball Coach

# Trust — What it means to us

Act with integrity and  
assume positive intent

Be authentic and  
honest in our  
interactions

Take our fiduciary  
responsibility seriously  
by prioritizing our  
clients' interests first

**“We intentionally designed an autonomous work environment where associates are trusted to do the right thing and work together to exceed our clients’ expectations.”**

**Craig Tann**

Managing Director, National Accounts






# Trust How we live it

- ▶ High level of transparency with associates and clients
- ▶ Seek excellence in all we do
- ▶ Support team members, even when they make mistakes
- ▶ Trust team members within an autonomous environment
- ▶ Communicate candidly



**“It doesn’t make sense to hire smart people and tell them what to do. We hire smart people so they can tell us what to do.”**  
**Steve Jobs**  
Former CEO of Apple

# Respect — What it means to us



Embrace and  
celebrate diversity  
in all forms



Seek to  
understand others



Communicate  
transparently and  
respectfully

**“Individual perspectives are valued, new ideas are encouraged and teammates are celebrated because of their differences.”**

**Anna Corona**

Chief People Officer



# Respect How we live it

- ▶ Open communication
- ▶ Collegial environment
- ▶ Flat organization
- ▶ DEI advisory group and initiatives
- ▶ Value our differences




**“Fight for the things that you care about but do it in a way that will lead others to join you.”**

**Ruth Bader Ginsberg**

Former Associate Justice of the Supreme Court of the United States

# Diversity, equity and inclusion



**“Diversity drives innovation — when we limit who can contribute, we in turn limit what problems we can solve.”**

**Telle Whitney**

Former CEO and President of the Anita Borg Institute for Women and Technology

# Our DEI pillars

We resolve to do our part to foster diversity and inclusion at Diamond Hill, in our industry and within our community.



# Our DEI pillars



## Inclusive culture

- Nurture an inclusive culture that encourages associates to bring their whole selves to work and creates a sense of belonging.
- Promote an environment where diverse viewpoints and ideas can be heard and appreciated.
- Provide associates with activities, dialogue and training that fosters awareness, learning and trust.



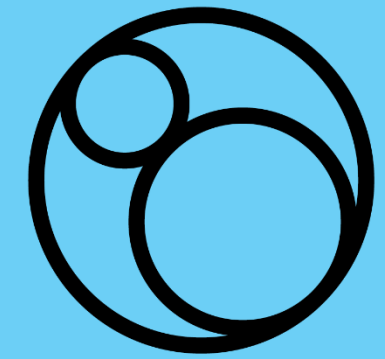
## Workforce diversity

- Create, retain and promote an inclusive workforce.
- Broaden recruiting efforts to build and nurture a diverse talent pipeline.



## Philanthropy and community

- Focus on building a more diverse financial services industry talent pipeline through philanthropic and community initiatives.
- Highlight and emphasize efforts that focus on historically underrepresented groups.
- Seek to support organizations that contribute to a vibrant minority business community.



## Vendors and policy

- Utilize our discretionary expenditures and vendor relationships to encourage partners we conduct business with to embrace our commitment to DEI.
- Continually evaluate our internal policies, processes and philosophies to ensure they combat systemic biases and create an environment of equity and inclusivity.



# Life at Diamond Hill

# Build client partnerships that last



## 21 Year Partnership

LifeCare Alliance is central Ohio's first in-home health agency. Ohio's first agency to provide visiting nurses, and the nation's second agency to deliver Meals-On-Wheels.



## 17 Year Partnership

Ohio Dominican University is a Catholic liberal arts university in the Dominican tradition. ODU is guided in its educational mission by the Dominican motto: To contemplate truth and to share with others the fruits of this contemplation.



## 15 Year Partnership

The City of Hialeah is the sixth largest municipality in Florida, serving over 224,000 residents living in approximately 20-square miles.



## 11 Year Partnership

The Catholic Archdiocese of San Francisco serves Marin, San Mateo and San Francisco counties in California through 89 parishes, 55 schools, and hospitals.



## 11 Year Partnership

Highmark is one of America's leading health insurance organizations. Its affiliated health plans (collectively, the Health Plans) work passionately to deliver high-quality, accessible, understandable, and affordable experiences, outcomes, and solutions to customers.



## 10 Year Partnership

Baptist Health Foundation of San Antonio is committed to improving the health of our community by fostering and funding clinical, educational, spiritual and scientific initiatives.



## 6 Year Partnership

Oshkosh Corporation builds some of the industry's toughest specialty trucks and access equipment. While machines are its business, Oshkosh business is so much more than machines. It's about building, protecting and serving communities across the world.

DIAMOND HILL

Engage and invest in the communities where we live and work

We give back to our communities every year through volunteerism and donation matching.

We match donations up to \$2,000 per associate per year, including an additional \$1,000 per associate match per year for DEI related causes.

Below is just a handful of the organizations we support each year.



Ronald McDonald House Charities®



CRISTO REY  
COLUMBUS HIGH SCHOOL

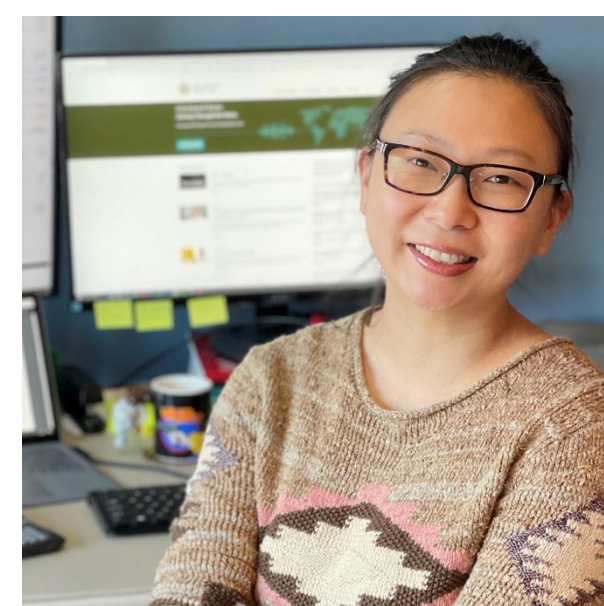
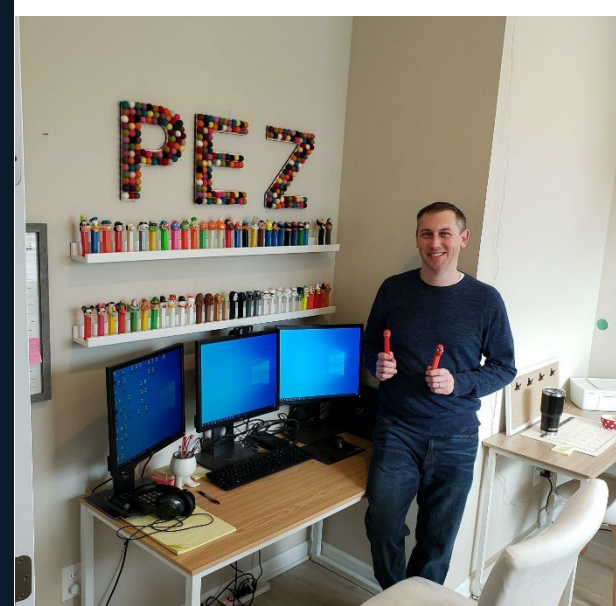


# Have fun with our teammates



Life at Diamond Hill

# #TeamDH



**Always  
learning.  
Always  
evolving.**

Diamond Hill celebrated its 20-year anniversary in 2020. We've grown from five employees to over 125 in 2023.

Our culture represents who we are today and who we aspire to be.

We will continue to grow, learn and improve, and we will evolve our culture as we go.

## LET'S CONNECT

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