

Krueger & Catalano

In a complicated world, Ryan Krueger (@RyanKruegerROI) and Mike Catalano aim to provide their clients with simple solutions. Understanding the needs of the families they serve, communication is a core tenant of the client relationships that they build. Since integrating YCharts into the firm's financial planning, investment management and retirement advisory services, Krueger & Catalano leverage the platform every day to simplify and explain the philosophy behind their recommendations.

About The Firm

Krueger & Catalano Capital Partners is an independent RIA based in Houston, TX managing over \$400 million in client assets. Established in 2006 by a team of experienced portfolio managers, the firm works side-by-side with each client to build personalized financial plans designed to help them reach their retirement goals. With a focus on client education, the Krueger & Catalano team builds trust with their clients and forms long-term relationships that extend through retirement.

The Challenge

A Bloomberg user for many years, Ryan Krueger, co-owner, financial advisor and portfolio manager at Krueger & Catalano, was searching for a way to simplify the firm's research process. Although Ryan could access all the data he needed on his Bloomberg terminal, the system fell short in terms of creating shareable, client-friendly content based on that data. He knew that communicating an insight was arguably more important than the insight itself, and began looking for a tool that could bridge the gap.

Knowing that market and economic data is a lot more digestible in a visual format, Ryan needed a tool that could create the data visualizations, charts, and deep-dive reports he shares with his clients in meetings and online. After coming across YCharts in 2016, he dug in and found that the more he learned about the platform, the more he became convinced that YCharts would take the insights he was eager to share with his clients to the next level.



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The Solution

As soon as the firm got up-and-running with YCharts, Ryan said his “Aha!” moment was the “good, old fashioned, friendly customer service” he received from his customer success manager throughout the onboarding process.

“I am not being polite or sugar-coating it when I say EVERY time I have a question or idea, it is answered and addressed quickly,” Ryan beamed. “The culture, energy and sharp team YCharts has built is a big deal to me.”

In addition to his interactions with the YCharts team, Ryan was equally impressed with what he’s seen from the platform itself. He’s been especially enthusiastic about the modern elements of the platform, it’s clean design and user-friendly interface.

Of the auto-complete search fields throughout YCharts, Ryan said “I need more auto-complete in my life. When I’m looking for something in YCharts, the system will have it pulled up before I type the first word.”

But search bars aside, Ryan’s most compelling realization about YCharts was that it enables him to communicate better with his clients. Some of his clients like his “deep dive” research, while others simply like to look at “picture pages.” No matter the client or their preferred method of communication, Ryan leans on YCharts to simplify complex topics when educating his clients.

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With all the distractions that today’s investors experience in their day-to-day lives, Ryan makes sure that he’s a calming presence and keeps his clients focused on the bigger picture.

“As a portfolio manager, our challenge in the digital age is making sure you routinely zoom out with a wider lens,” Ryan said. “While everybody else is debating forests and trees, I want to make sure my clients know we are keeping track of the ground and sky around them, and those oceans of capital around them all.”

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The Results

Krueger & Catalano holds so-called “stock tournaments” at the end of every week in order to “re-score” the stocks they’re holding or watching.

As managing client portfolios is a big piece of their business, Ryan is thrilled that YCharts is the engine behind this weekly exercise and all their other research.

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“Our data source bracketologist is YCharts,” Ryan says. “And to facilitate the ‘first round’ of our stock tournaments, we’ve developed a scoring model in the YCharts Stock Screener to identify the companies that we feel have competitive advantages.

“Once Ryan has screened down to a manageable list, he carries that Watchlist into Comp Tables for more granular comparisons. While most try to evaluate the size of a company’s moat, Ryan uses YCharts to answer one of his favorite un-crowded questions: “What is the direction of change for any sized advantage a company has?” This approach, and YCharts’ related capabilities, have helped Ryan make smarter investments that aren’t often clear for many to see.

And after reflecting longer, Ryan said, “like McCormick in your kitchen cabinet, YCharts is probably in even more “dishes” than it gets credit for in our research process.”

Ryan’s advice to fellow advisors who are considering YCharts is to “follow that curiosity.” He’s certainly glad he remained curious about tools that made life easier for advisors and their clients.

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Success Made with YCharts

Krueger & Catalano leans on YCharts to power their “picture books” and “stock tournaments” that are the basis of their client communications and investment research process.

Need a better way to research investments and communicate your strategy to clients?



Comp Tables



Fundamental Charts



Stock Screener



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