



FIRST CAPITAL
FINANCIAL



WORLD SOURCE
FINANCIAL MANAGEMENT INC.
Sponsoring Mutual Fund Dealer



2026.02.18

This week marked a milestone for one of our wealth management providers - **Dimensional** (DFA). The company crested past USD \$1 Trillion in assets under management (AUM), making it one of the largest financial services companies in the world.

Although there are many great wealth managers we work with, today we would like to highlight **Dimensional** and how it fits into our investment strategy. Investment options are selected based on your risk profile and unique needs, and are matched with the specific characteristics of the available funds.

Dimensional employs an evidenced-based, systematic investment philosophy focused on capturing higher expected returns by targeting specific risk factors. Grounded in academic research and Nobel Prize-winning insights, **Dimensional** emphasizes broad diversification, low costs and a flexible trading strategy that avoids market timing.

The core compliment of their investment thesis include:

Factor-Based Investing: instead of picking stocks, DFA portfolios are designed to systematically overweight securities with higher expected returns, specifically smaller companies, value stocks and firms with high profitability.

Evidence-Based Approach: DFA relies on long-term data rather than forecasting, believing that market prices incorporate all available information. This is known as Modern Portfolio Theory (MPT), a mathematical framework for constructing optimal investment portfolios. From MPT investors can invest along the efficient frontier, wherein either the highest expected return for a given level of risk, or the lowest risk for given level of expected return can be determined. For more on MPT click [HERE](#) .

Efficient Implementation: rather than passive indexing, they use a systematic active approach, using daily market data to inform trading, managing turnover and redacting transaction costs to improve net returns.

We are committed at First Capital to *delivering a better investment outcome*, and **Dimensional** is one of the core wealth management companies fundamental to our investment mandates. **Dimensional's** strategy is predicated on financial science and the positive outcomes allow us to focus on building our relationship with you. This includes understanding your financial goals and objectives and how you want to use your wealth to live with intention. For more on **Dimensional** click [HERE](#).

Thanks for reading!

Martin

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Source: Dimensional (<https://www.dimensional.com/us-en/our-philosophy>)

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