

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.

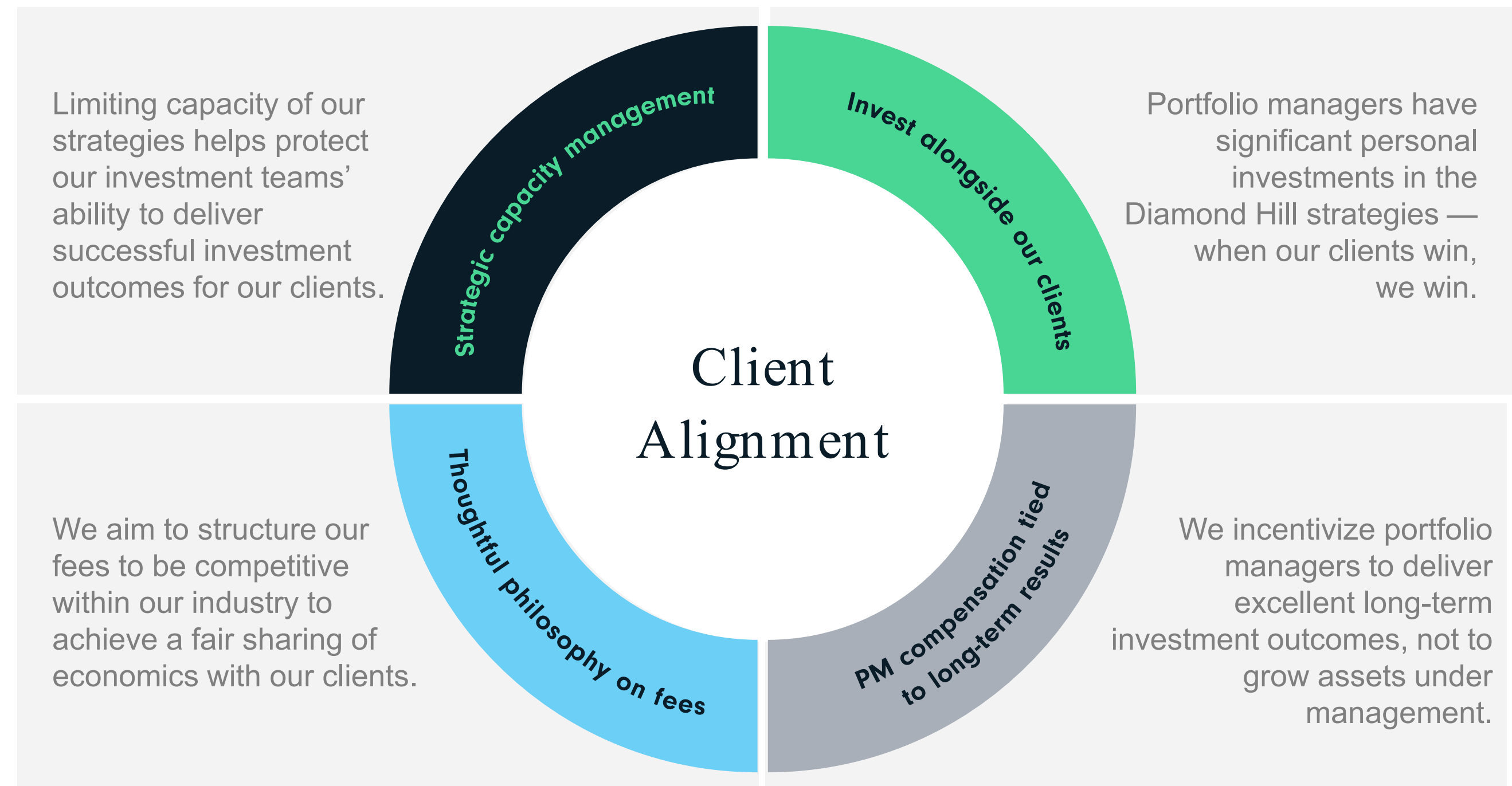
Centralized Infrastructure

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

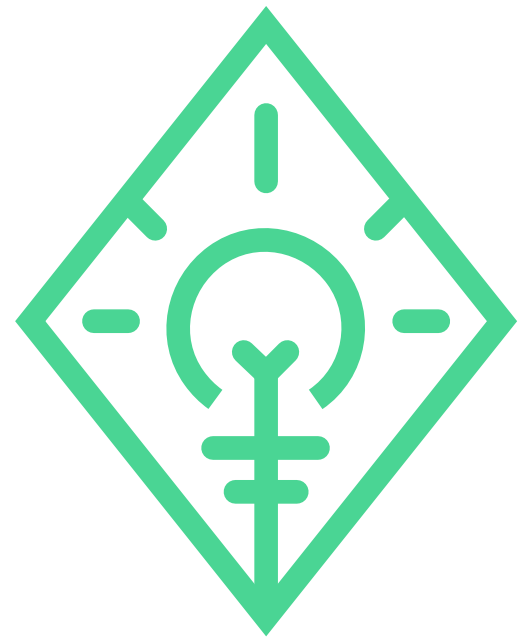


“It’s not hard to make decisions once you know what your values are.”

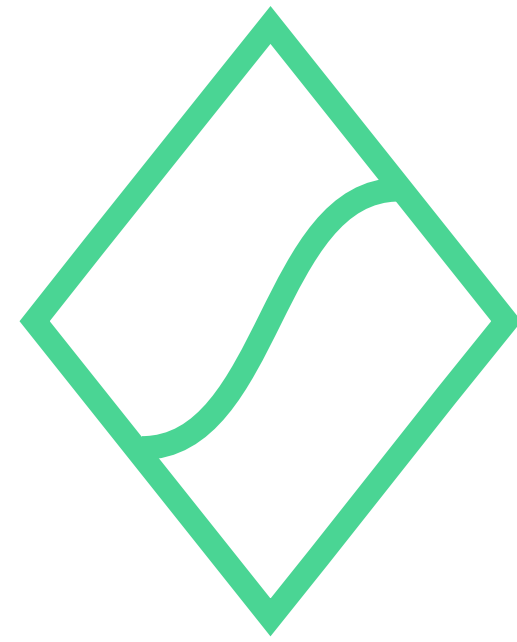
Walt Disney

Acclaimed animator, film producer and entrepreneur.

Our core values



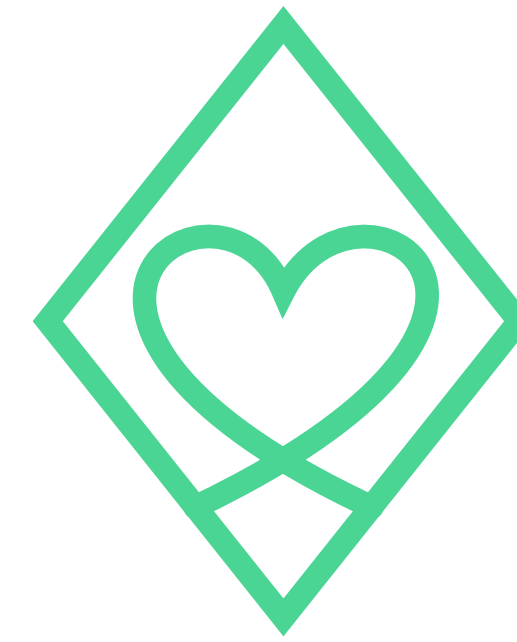
Curiosity



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, Strategic Partners and Client Engagement




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.



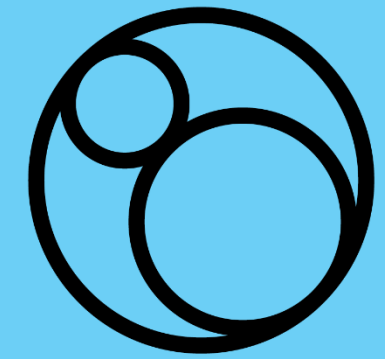
Workforce diversity

- 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

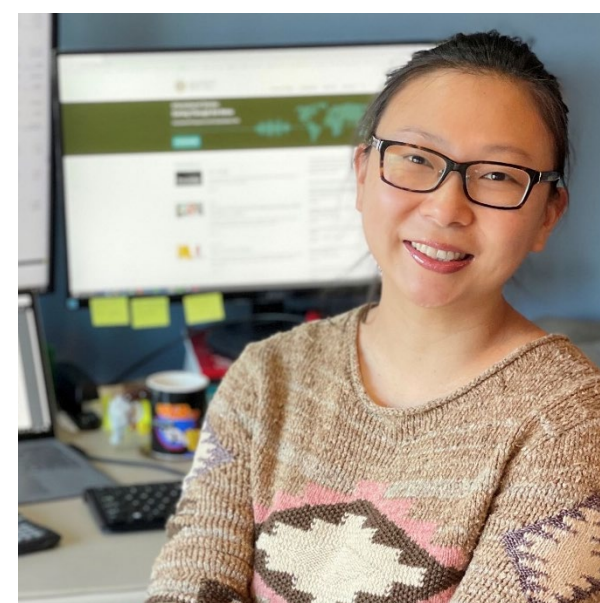
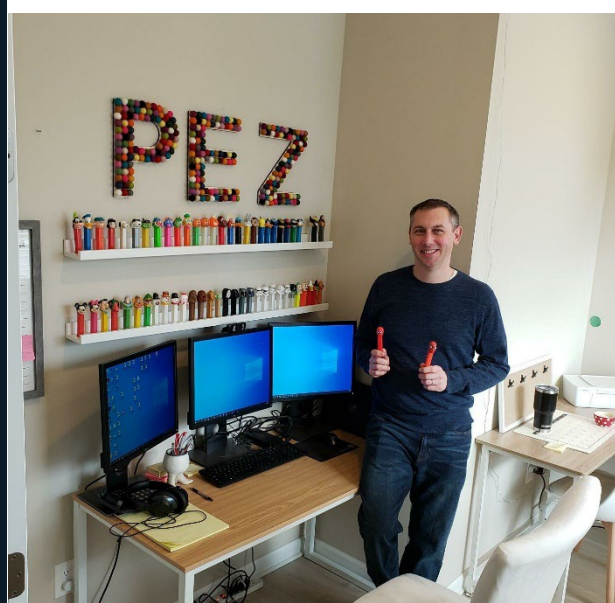


Have fun with our teammates



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 2024.

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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