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Sanders Morris Harris Group, Inc. Fundamental Company Report Including Financial, SWOT, Competitors and Industry Analysis

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Abstracts

Sanders Morris Harris Group, Inc. Fundamental Company Report provides a complete overview of the company's affairs. All available data is presented in a comprehensive and easily accessed format. The report includes financial and SWOT information, industry analysis, opinions, estimates, plus annual and quarterly forecasts made by stock market experts. The report also enables direct comparison to be made between Sanders Morris Harris Group, Inc. and its competitors. This provides our Clients with a clear understanding of Sanders Morris Harris Group, Inc. position in the Industry.

The report contains detailed information about Sanders Morris Harris Group, Inc. that gives an unrivalled in-depth knowledge about internal business-environment of the company: data about the owners, senior executives, locations, subsidiaries, markets, products, and company history.

Another part of the report is a SWOT-analysis carried out for Sanders Morris Harris Group, Inc.. It involves specifying the objective of the company's business and identifies the different factors that are favorable and unfavorable to achieving that objective. SWOT-analysis helps to understand company's strengths, weaknesses, opportunities, and possible threats against it.

The Sanders Morris Harris Group, Inc. financial analysis covers the income statement and ratio trend-charts with balance sheets and cash flows presented on an annual and quarterly basis. The report outlines the main financial ratios pertaining to profitability, margin analysis, asset turnover, credit ratios, and

company’s long-term solvency. This sort of company's information will assist and strengthen your company’s decision-making processes.

In the part that describes Sanders Morris Harris Group, Inc. competitors and the industry in whole, the information about company's financial ratios is compared to those of its competitors and to the industry. The unique analysis of the market and company’s competitors along with detailed information about the internal and external factors affecting the relevant industry will help to manage your business environment. Your company’s business and sales activities will be boosted by gaining an insight into your competitors’ businesses.

Also the report provides relevant news, an analysis of PR-activity, and stock price movements. The latter are correlated with pertinent news and press releases, and annual and quarterly forecasts are given by a variety of experts and market research firms. Such information creates your awareness about principal trends of Sanders Morris Harris Group, Inc. business.

About Sanders Morris Harris Group, Inc.

Sanders Morris Harris Group Inc. operates as a wealth management company. The company’s businesses include asset management activities, programs, and products to support wealth managers. In addition, the company offers various trading, sales, and research services for institutional investors.

Products and Services

The company is organized in three client sectors: Mass affluent, High net worth, and Institutional services.

Mass Affluent

Edelman Financial Services, LLC (EFS) is the company’s main subsidiary. The business is centered on serving the mass affluent household. Most investments are managed in the Edelman Managed Asset Program (EMAP).

Through EMAP, investors get a professionally designed investment portfolio that provides an array of asset classes and market sectors. EMAP also offers dynamic security selection, strategic rebalancing, and an array of client services.

The Ric Edelman Show provides listeners with comprehensive, educational financial advice -- how to buy a home, pay for college, prepare for retirement, care for elders, get out of debt, and invest appropriately for their situation.

High Net Worth

The company's high net worth business provides investment advisory, wealth and investment management, asset management and financial planning to high net worth and mass affluent individuals and institutions.

Each of its high net worth units focuses on a different portion of the wealth management business in terms of client type and location, asset and product type, and distribution channel.

Kissinger Financial Services: Kissinger Financial Services (Kissinger), a division of SMH based in Hunt Valley, Maryland, provides financial planning and investment management services to high net worth and mass affluent individuals.

The Rikoon Group, LLC: The Rikoon Group, LLC (Rikoon), based in Santa Fe, New Mexico, provides wealth management services to high net worth individuals, including financial and estate planning, investment management services, wealth education, and family retreats. Rikoon operates nationally with fee only investment counsel and also offers comprehensive family office services.

Leonetti & Associates, LLC: Leonetti & Associates, LLC (Leonetti), a registered investment advisor based in Buffalo Grove, Illinois, provides fee-based investment advice for individuals and small businesses. Leonetti provides investment management and financial planning services to enhance client portfolios and help them reach their financial goals. The company owns 50.1% of Leonetti.

Miller-Green Financial Services, Inc. (Miller-Green): Miller-Green is a registered investment advisor based in The Woodlands, Texas that provides financial, investment, retirement, and/or estate planning services to individuals and families. The company owns 100% of Miller-Green.

The Dickenson Group, LLC: The Dickenson Group, LLC (Dickenson) is based in Solon, Ohio, engages in insurance planning for individuals, families, and businesses as well as employee benefits communications and estate planning. It serves corporations,

practices, and individuals. The company owns 50.1% of Dickenson.

Select Sports Group Holdings, LLC: Select Sports Group Holdings, LLC (SSG) and its affiliates, based in Houston, Texas, provide sports representation and management services to professional athletes, principally professional football players, in contract negotiation, marketing and endorsements, public relations, legal counseling, and related areas. The company's SSG clients have access to its investment programs in the areas of stocks, bonds, private equity, and specialized investment vehicles. Additionally, the company provides a deal-screening program that reviews the various investment opportunities offered to professional athletes. The company owns 50% of SSG.

SMH Capital Advisors, Inc: SMH Capital Advisors, Inc. (SMH Capital Advisors) is a registered investment advisor located in Fort Worth, Texas, provides investment management services primarily related to high-yield fixed income securities. The company owns 100% of SMH Capital Advisors.

Additionally, SMH has organized 19 proprietary funds for the purpose of investing primarily in equity or equity-linked securities, interest-bearing debt securities, and debt securities convertible into common stock. These funds invest primarily in small to mid-capitalization companies, both public and private. Companies in which the funds invest represent various industries, including life sciences, energy, technology, and industrial services.

Institutional Services

The company's institutional businesses provide institutional brokerage, fixed income brokerage, and prime brokerage services to institutional customers.

Institutional Equity: The company's institutional clients include an array of institutions throughout North America, Europe, and Asia, including banks, retirement funds, mutual funds, endowments, investment advisors, and insurance companies. The company provides institutional clients with execution and trading services in both exchange-listed equity securities and equity securities quoted on Nasdaq. The company has institutional equity operations in Los Angeles and New York.

Concept Capital: The Concept Capital division of SMH (Concept Capital) is based in New York. It provides prime brokerage services, research and capital markets trading, fund accounting and administration, and a research library through the Washington Research Group.

Concept Capital also has asset management agreements with individual third party asset managers to manage a portfolio of the company's assets. Most of the accounts have escrow deposits held with the related clearing broker to insulate the company from trading losses.

History

Sanders Morris Harris Group Inc. was founded in 1998.

The above Company Fundamental Report is a half-ready report and contents are subject to change.
It means that we have all necessary data in our database to prepare the report but need **2-3 days** to complete it. During this time we are also updating the report with respect to the current moment. So, you can get all the most recent data available for the same price. Please note that preparation of additional types of analyses requires extra time.

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1 – Data availability depends on company's security policy.
2 – These sections are available only when you purchase a report with appropriate additional types of analyses.
The complete financial data is available for publicly traded companies.

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ANALYSIS FEATURES

SWOT Analysis

SWOT, which stands for Strengths, Weaknesses, Opportunities and Threats, is an analytical framework that identifies the internal and external factors that are favorable and unfavorable for a company.

Enhanced SWOT Analysis

Enhanced SWOT is a 3×3 grid that arranges strengths, weaknesses, opportunities and threats into one scheme:

How to use the strengths to take advantage of the opportunities?

How to use the strengths to reduce likelihood and impact of the threats?

How to overcome the weaknesses that obstruct taking advantage of the opportunities?

How to overcome the weaknesses that can make the threats a reality?

Upon answering these questions a company can develop a project plan to improve its business performance.

PESTEL Analysis

PESTEL (also termed as PESTLE) is an ideal tool to strategically analyze what influence different outside factors – political, economic, sociocultural, technological, environmental and legal – exert on a business to later chart its long term targets.

Being part of the external analysis when carrying out a strategic assessment or performing a market study, PESTEL gives an overview of diverse macro-environmental factors that any company should thoughtfully consider. By perceiving these outside environments, businesses can maximally benefit from the opportunities while minimizing the threats to the organization.

Key Factors Examined by PESTEL Analysis:

Political – What opportunities and pressures are brought by political bodies and what is the degree of public regulations' impact on the business?

Economic – What economic policies, trends and structures are expected to affect the organization, what is this influence's degree?

Sociological – What cultural and societal aspects will work upon the demand for the business's products and operations?

Technological – What impact do the technological aspects, innovations, incentives and barriers have on the organization?

Environmental – What environmental and ecological facets, both locally and farther afield, are likely to predetermine the business?

Legal – What laws and legislation will exert influence on the style the business is carried out?

IFE, EFE, IE Matrices

The Internal Factor Evaluation matrix (IFE matrix) is a strategic management tool helping audit or evaluate major weaknesses and strengths in a business's functional areas. In addition, IFE matrix serves as a basis for identifying and assessing relationships amongst those areas. The IFE matrix is utilised in strategy formulation.

The External Factor Evaluation matrix (EFE matrix) is a tool of strategic management that is typically utilised to assess current market conditions. It is an ideal instrument for visualising and prioritising the threats and opportunities a firm is facing.

The essential difference between the above mentioned matrices lies in the type of factors incorporated in the model; whilst the latter is engaged in internal factors, the former deals exceptionally with external factors – those exposed to social, political, economic, legal, etc. external forces.

Being a continuation of the EFE matrix and IFE matrix models, the Internal External matrix (IE matrix) rests upon an investigation of external and internal business factors

integrated into one suggestive model.

Porter Five Forces Analysis

The Porter's five forces analysis studies the industry of operation and helps the company find new sources of competitive advantage. The analysis surveys an industry through five major questions:

- What composes a threat of substitute products and services?
- Is there a threat of new competitors entering the market?
- What is the intensity of competitive rivalry?
- How big is the bargaining power of buyers?
- How significant is the bargaining power of suppliers?

VRIO Analysis

VRIO stands for Value, Rarity, Imitability, Organization. This analysis helps to evaluate all company's resources and capabilities and bring them together into one aggregate table that includes:

- Tangible resources
  - Financial
  - Physical
  - Technological
  - Organizational
- Intangible resources
  - Human
  - Innovation and Creativity

Reputation

Organizational capabilities

The result of the analysis gives a clear picture of company's competitive and economic implications, answering the questions if the resources mentioned above are:

Valuable?

Rare?

Costly to imitate?

Organized properly?

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