

U.S. Global Investors, Inc. Fundamental Company Report Including Financial, SWOT, Competitors and Industry Analysis

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Abstracts

U.S. Global Investors, 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 U.S. Global Investors, Inc. and its competitors. This provides our Clients with a clear understanding of U.S. Global Investors, Inc. position in the Industry.

The report contains detailed information about U.S. Global Investors, 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 U.S. Global Investors, 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 U.S. Global Investors, 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 U.S. Global Investors, 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 U.S. Global Investors, Inc. business.

About U.S. Global Investors, Inc.

U.S. Global Investors, Inc. and its subsidiaries provide investment advisory services. The company offers services to U.S. Global Investors Funds (USGIF) and U.S. Global Accolade Funds (USGAF), both Massachusetts business trusts (the 'Trusts' or 'Funds'), as well as four offshore clients. USGIF and USGAF are investment companies offering shares of nine and four mutual funds, respectively.

The company, as part of the mutual fund management business, provides: investment advisory services; transfer agency and record keeping services; mailing services; and distribution services, through its wholly owned broker/dealer, to mutual funds advised by the company. In addition, the company provides investment advisory services to other offshore institutional clients.

Lines of Business

Investment Management Services

Investment Advisory Services: The company furnishes an investment program for each of the clients it manages and determines, subject to overall supervision by the applicable board of trustees of the clients, the clients' investments pursuant to advisory

agreements. The portfolio team for each client determines what investments should be purchased, sold and held, and makes changes in the portfolio deemed to be necessary or appropriate.

The company also manages, supervises, and conducts certain other affairs of USGIF and USGAF, subject to the control of the boards of trustees. It provides office space, facilities, and certain business equipment as well as the services of executive and clerical personnel for administering the affairs of the mutual funds. U.S. Global and its affiliates compensate all personnel, officers, directors, and interested trustees of the funds if such persons are also employees of the company or its affiliates.

The company, in addition to providing mutual fund management and transfer agent services to USGIF and USGAF funds, provides advisory services to four offshore clients: the Meridian Global Gold and Resources Fund Ltd.; the Meridian Global Energy and Resources Fund; the U.S. Global Investors Balanced Natural Resources Fund, Ltd.; and Endeavour Mining Capital Corporation's equity investment portfolio.

Transfer Agent and Other Services

The company's wholly owned subsidiary, United Shareholder Services, Inc. (USSI), provides transfer agency, and printing services to investment company clients. The transfer agency utilizes a third-party external system providing the company's fund shareholder communication network with computer equipment and software designed to meet the operating requirements of a mutual fund transfer agency. The transfer agency agreements provide that USSI would receive, as compensation for services rendered as transfer agent, certain annual and activity-based fees and would be reimbursed for out-of-pocket expenses.

Brokerage Services

The company has registered its wholly owned subsidiary, U.S. Global Brokerage, Inc. (USGB), with the National Association of Securities Dealers (NASD), the Financial Industry Regulatory Authority (FINRA), the Securities and Exchange Commission (SEC), and appropriate state regulatory authorities as a limited-purpose broker/dealer for the purpose of distributing USGIF and USGAF fund shares.

Mailing Services

A&B Mailers, Inc., a wholly owned subsidiary of the company, provides mail-handling

services to various entities. A&B Mailers' primary customers include the company in connection with its efforts to promote the funds and the company's investment company clients in connection with required mailings.

History

U.S. Global Investors, Inc. was founded in 1968.

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 3x3 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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