

Westwood Holdings Group Inc. Fundamental Company Report Including Financial, SWOT, Competitors and Industry Analysis

<https://marketpublishers.com/r/W7B6B09D6B6BEN.html>

Date: May 2025

Pages: 50

Price: US\$ 499.00 (Single User License)

ID: W7B6B09D6B6BEN

Abstracts

Westwood Holdings 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 Westwood Holdings Group Inc. and its competitors. This provides our Clients with a clear understanding of Westwood Holdings Group Inc. position in the Industry.

The report contains detailed information about Westwood Holdings 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 Westwood Holdings 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 Westwood Holdings 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 Westwood Holdings 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 Westwood Holdings Group Inc. business.

About Westwood Holdings Group Inc.

Westwood Holdings Group, Inc., through its subsidiaries, engages in the management of investment assets and provision of services for its clients. The company's subsidiaries include Westwood Management Corp. and Westwood Trust.

WESTWOOD MANAGEMENT CORP

Westwood Management provides investment advisory services to corporate retirement plans, public retirement plans, endowments and foundations, a family of mutual funds, which the company calls the WHG Funds, other mutual funds and clients of Westwood Trust.

Managed Asset Classes

Asset Management: The company offers a range of investment asset classes allowing it to serve various types of clients and varying investment objectives.

LargeCap Value: Investments in equity securities of approximately 45-60 well-seasoned companies.

MidCap Value: Investments in equity securities of approximately 50-70 companies.

SMidCap Value: Investments in equity securities of approximately 45-60 companies.

SmallCap Value: Investments in equity securities of approximately 50-70 companies.

AllCap Value: Investments in equity securities of approximately 60-80 well-seasoned companies.

LargeCap Enhanced: Investments in equity securities of approximately 75-100 long and 20-30 short, well-seasoned companies.

Balanced: Investments in a combination of equity and fixed income securities, designed to provide both growth opportunities and income, while also emphasizing asset preservation in down markets.

Income Opportunity: Investments in dividend-paying common stocks, straight and convertible preferred stock, master limited partnerships, REITs and selected debt instruments.

Master Limited Partnerships (MLPs): Investments include MLPs (including limited partnerships, 'LPs', and general partnerships, 'GPs), securities of tanker and other marine shipping companies and other securities.

Core/Intermediate Fixed Income: Investments in intermediate term corporate and government bonds.

Advisory and Subadvisory Service Agreements

Westwood Management manages client accounts under investment advisory and subadvisory agreements. Westwood Management provides overall investment management services, including directing investments in conformity with the investment objectives and restrictions established by clients. Westwood Management is also a party to subadvisory agreements with other investment advisors under which it performs substantially the same services as it does under its advisory agreements.

Under its subadvisory agreement with Teton Advisors, Inc., Westwood Management provides investment advisory services to the GAMCO Westwood Funds family of mutual funds. While Westwood Management provides subadvisory services with respect to the

Westwood Funds family of funds, Westwood Management provides investment advisory services directly to the WHG Funds family of mutual funds, which includes the WHG SMidCap Fund, the WHG Income Opportunity Fund, the WHG LargeCap Value Fund, the WHG Balanced Fund and the WHG SmallCap Value Fund.

WESTWOOD TRUST

Westwood Trust provides trust and custodial services and participation in common trust funds that it sponsors to institutions and high net worth individuals. Westwood Trust also provides back office services to its clients, including tax reporting, distribution of income to beneficiaries, preparation of trust and account statements and attending to the special needs of particular trusts, as well as serves as trustee for tax and estate-planning purposes and for special needs trusts.

Westwood Trust primarily provides services for employee benefit trusts and personal trusts. Employee benefit trusts include retirement plans of businesses to benefit their employees, such as defined contribution plans, pensions and profit sharing plans. Westwood Trust may also be appointed as a trustee and provide administrative support for these plans, as well as investment advisory and custodial services. Personal trusts are developed to achieve different objectives, and Westwood Trust acts as trustee to these trusts and assists them in developing trust portfolios.

Services: Westwood Trust undertakes a fiduciary responsibility toward the management of each client's assets and utilizes a consultative asset allocation approach. This approach involves Westwood Trust examining the client's financial situation, including the client's portfolio of investments, and advising the client on ways in which it can improve its investment returns and financial position. Westwood Trust also provides custodial services, safekeeping and accounting services.

Common Trust Funds: Westwood Trust sponsors various common trust funds in which its clients' assets are commingled to achieve economies of scale. Westwood Trust's common trust funds fall within two basic categories: personal trusts and employee benefit trusts. Westwood Trust sponsors common trust funds for majority of the asset classes managed by Westwood Management. Westwood Trust also engages third party subadvisors for common trust funds, such as its Growth Equity, International Equity and High Yield Bond common trust funds.

Enhanced Balanced Portfolios: Westwood Trust offers its clients the ability to diversify among multiple different asset classes.

History

Westwood Holdings Group, Inc. was founded in 1983.

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.

Contents

RESEARCH METHODOLOGY

DISCLAIMER

1. WESTWOOD HOLDINGS GROUP INC. COMPANY PROFILE

- 1.1. Key facts
- 1.2. Financial Performance
- 1.3. Key Executives
- 1.4. Ownership and Major Holders
- 1.5. Company History

2. WESTWOOD HOLDINGS GROUP INC. BUSINESS OVERVIEW

- 2.1. Business Description
- 2.2. Major Products and Services
- 2.3. Markets and Sales Activities
- 2.4. Locations, Subsidiaries, Operating Units

3. WESTWOOD HOLDINGS GROUP INC. SWOT ANALYSIS

- 3.1. Overview
- 3.2. Strengths
- 3.3. Weaknesses
- 3.4. Opportunities
- 3.5. Threats

4. WESTWOOD HOLDINGS GROUP INC. FINANCIAL ANALYSIS

- 4.1. Financial Statements
 - 4.1.1. Income Statement
 - 4.1.2. Balance Sheet
 - 4.1.3. Cash Flow
- 4.2. Financial Ratios
 - 4.2.1. Profitability
 - 4.2.2. Margin Analysis

- 4.2.3. Asset Turnover
- 4.2.4. Credit Ratios
- 4.2.5. Long-Term Solvency
- 4.2.6. Growth Over Prior Year
- 4.2.7. Financial Ratios Charts
- 4.3. Stock Market Snapshot

5. WESTWOOD HOLDINGS GROUP INC. COMPETITORS AND INDUSTRY ANALYSIS

- 5.1. Westwood Holdings Group Inc. Direct Competitors
- 5.2. Comparison of Westwood Holdings Group Inc. and Direct Competitors Financial Ratios
- 5.3. Comparison of Westwood Holdings Group Inc. and Direct Competitors Stock Charts
- 5.4. Westwood Holdings Group Inc. Industry Analysis
 - 5.4.1. Industry Snapshot
 - 5.4.2. Westwood Holdings Group Inc. Industry Position Analysis

6. WESTWOOD HOLDINGS GROUP INC. NEWS & EVENTS

- 6.1. News & PR Activity Analysis
- 6.2. IR Corporate News
- 6.3. Marketing News
- 6.4. Corporate Events

7. WESTWOOD HOLDINGS GROUP INC. EXPERTS REVIEW¹

- 7.1. Experts Consensus
- 7.2. Experts Revisions

8. WESTWOOD HOLDINGS GROUP INC. ENHANCED SWOT ANALYSIS²

9. UNITED STATES PESTEL ANALYSIS²

- 9.1. Political Factors
- 9.2. Economic Factors
- 9.3. Social Factors
- 9.4. Technological Factors

9.5. Environmental Factors

9.6. Legal Factors

10. WESTWOOD HOLDINGS GROUP INC. IFE, EFE, IE MATRICES²

10.1. Internal Factor Evaluation Matrix

10.2. External Factor Evaluation Matrix

10.3. Internal External Matrix

11. WESTWOOD HOLDINGS GROUP INC. PORTER FIVE FORCES ANALYSIS²

12. WESTWOOD HOLDINGS GROUP INC. VRIO ANALYSIS²

APPENDIX: RATIO DEFINITIONS

LIST OF FIGURES

Westwood Holdings Group Inc. Annual Revenues in Comparison with Cost of Goods Sold and Gross Profit

Profit Margin Chart

Operating Margin Chart

Return on Equity (ROE) Chart

Return on Assets (ROA) Chart

Debt to Equity Chart

Current Ratio Chart

Westwood Holdings Group Inc. 1-year Stock Charts

Westwood Holdings Group Inc. 5-year Stock Charts

Westwood Holdings Group Inc. vs. Main Indexes 1-year Stock Chart

Westwood Holdings Group Inc. vs. Direct Competitors 1-year Stock Charts

Westwood Holdings Group Inc. Article Density Chart

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.

List Of Tables

LIST OF TABLES

Westwood Holdings Group Inc. Key Facts
Profitability
Management Effectiveness
Income Statement Key Figures
Balance Sheet Key Figures
Cash Flow Statement Key Figures
Financial Performance Abbreviation Guide
Westwood Holdings Group Inc. Key Executives
Westwood Holdings Group Inc. Major Shareholders
Westwood Holdings Group Inc. History
Westwood Holdings Group Inc. Products
Revenues by Segment
Revenues by Region
Westwood Holdings Group Inc. Offices and Representations
Westwood Holdings Group Inc. SWOT Analysis
Yearly Income Statement Including Trends
Income Statement Latest 4 Quarters Including Trends
Yearly Balance Sheet Including Trends
Balance Sheet Latest 4 Quarters Including Trends
Yearly Cash Flow Including Trends
Cash Flow Latest 4 Quarters Including Trends
Westwood Holdings Group Inc. Profitability Ratios
Margin Analysis Ratios
Asset Turnover Ratios
Credit Ratios
Long-Term Solvency Ratios
Financial Ratios Growth Over Prior Year
Westwood Holdings Group Inc. Capital Market Snapshot
Westwood Holdings Group Inc. Direct Competitors Key Facts
Direct Competitors Profitability Ratios
Direct Competitors Margin Analysis Ratios
Direct Competitors Asset Turnover Ratios
Direct Competitors Credit Ratios
Direct Competitors Long-Term Solvency Ratios
Industry Statistics

Westwood Holdings Group Inc. Industry Position
Company vs. Industry Income Statement Analysis
Company vs. Industry Balance Sheet Analysis
Company vs. Industry Cash Flow Analysis
Company vs. Industry Ratios Comparison
Westwood Holdings Group Inc. Consensus Recommendations¹
Analyst Recommendation Summary¹
Price Target Summary¹
Experts Recommendation Trends¹
Revenue Estimates Analysis¹
Earnings Estimates Analysis¹
Historical Surprises¹
Revenue Estimates Trend¹
Earnings Estimates Trend¹
Revenue Revisions¹

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?

I would like to order

Product name: Westwood Holdings Group Inc. Fundamental Company Report Including Financial, SWOT, Competitors and Industry Analysis

Product link: <https://marketpublishers.com/r/W7B6B09D6B6BEN.html>

Price: US\$ 499.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

info@marketpublishers.com

Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/W7B6B09D6B6BEN.html>