

Business Insider

We spoke with Wall Street's 9 best-performing fund managers of 2020 to learn how they crushed the chaotic market — and compile the biggest bets they're making for 2021

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6. Garvin Jabusch and Jeremy Deems, co-managers of the Shelton Green Alpha Fund



Shelton Green Alpha Funds

Speak with Colorado-based Garvin Jabusch and Jeremy Deems, and you'll realize they're not your standard fund managers.

You might discover, for example, that they're big fans of Taylor Swift. Or that, according to Deems, Jabusch used to bench press several reps of 405lbs during what Jabusch describes as his "meathead" phase.

Good friends working together now since 2001, they're a compatible pair.

And this year has been proven to be eminently compatible with the holdings of their [Shelton Green Alpha Fund](#).

Their investing philosophy is framed around buying into companies working to come up with innovative solutions to society's biggest problems, such as climate change.

But their exposure to these types of firms ranges across a variety of market sectors — including the biopharmaceutical industry.

That paid off big for them in 2020 — with Moderna as one of their biggest holdings — as the COVID-19 outbreak wreaked havoc on the world and companies and governments raced to find a vaccine.

Year-to-date return: 74.66%

What worked in 2020

Jabusch:

"What are the big system-level that we're looking to solve with our companies. Well, of course the climate crisis is the granddaddy of them, but there's also resource degradation, there's worsening inequality, and there is of course the terrible human disease burden. And I don't just mean pandemics, although that clearly is a thing.

"And so the things that are addressing those risks that have been the most innovative have been our best contributors this year. So if you

look at year-to-date, you can see that our second-highest contributing holding, not even our second-highest weight, has been Moderna."

What's ahead in 2021

Deems:

"So honestly the only thing that's going to change is we might find something that's disrupting an innovation that we already hold today, and we may change our mind on what we think is going to be the winner in that particular area. That's really what the point of our research is, to do two things: to find companies we haven't looked at yet, in spaces that we already expect important disruption; and then two, we want to make sure the holdings we do have are still the leaders."

Jabusch:

"You're going to continue to see the solutions to problems just gobbling up market share from the causes of the problems. Wind is just going to keep stealing away the market share from coal, and that's not only because it's economically superior in terms of being cheaper to make electricity, but also because it's helping to mitigate the climate crisis."