

Carret Asset Management's Fixed-Income Strategy Recognized as PSN Top Gun Performer

Monday March 12, 2018 11:30am

New York, NY – Carret Asset Management, LLC (CAM) today announced that its Taxable Fixed-Income Strategy has achieved PSN Top Guns status by Informa Investment Solutions for the fourth quarter of 2017. Carret's Taxable Fixed-Income Strategy has been awarded six star Top Gun designation reflecting returns above the PSN style benchmark and low standard deviation compared with the peer group. Carret's Taxable Strategy utilizes an investment-grade, intermediate duration focus. This is the third consecutive quarterly Top Gun Performance award the strategy has received.

"We are proud to be recognized for this achievement," said Jason Graybill, CFA and Neil Klein, Co-Directors of Fixed-Income Strategy at CAM. "Our Taxable Bond Strategy continues to emphasize fundamental credit research and active portfolio management as a way to provide consistent and attractive risk adjusted returns. Our Taxable Fixed-Income Strategy is currently positioned to take advantage of a rising rate environment coupled with an improving economic outlook."

Utilizing a proprietary blend of Informa Investment Solutions' top priority performance screens, PSN Top Guns ranks products in six proprietary star categories in over 50 universes. This is a highly anticipated quarterly ranking and is widely used by institutional asset managers and investors.

About Carret Asset Management, LLC

Founded in 1963, Carret Asset Management, LLC, is an independent investment advisor headquartered in New York City. Carret manages in excess of \$2.6 billion in assets for wealth managers, financial advisors, corporate relationships, select institutions, mutual fund companies, non-profit organizations and high-net-worth individuals and families. Carret Asset Management manages four fixed income separately managed account (SMA) strategies and two mutual funds.

About Informa Investment Solutions

A market leader in intelligence and software solutions for investment professionals and financial institutions of all sizes, Informa Investment Solutions offers a robust set of analytics and tools to help you grow and retain your business. With a nearly 40-year history, Informa Investment Solutions is part of Informa PLC, a leading business-to-business knowledge provider serving International markets. Informa Investment Solutions has set the standard for providing turnkey and customizable applications for performing manager searches, building wealth plans, and producing client reports and investment marketing materials for companies worldwide.

For more information about Carret Asset Management, LLC contact Frank Levering at 212.207.2331 or flevering@carret.com. Additional information is available at Carret's website www.carret.com.

Past performance may not be indicative of future results. Different types of investments and investment strategies involve varying degrees of risk, including principal loss and fluctuation. It should not be assumed that future performance of the investment strategy referenced herein will be profitable during any specific time period. No client or prospective client should assume that the strategy mentioned in this release will be appropriate for his/her/its portfolio, or that any discussion serves as the receipt of, or a substitute for, personalized advice from CAM.