



Carret Asset Management Named to PSN Top Guns List of Best Performing Strategies for 2Q 2022

Quarterly PSN Top Guns List published by Zephyr identifies best-in-class separate accounts, managed accounts, and managed ETF strategies

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New York, NY – Carret Asset Management, LLC (CAM) today announced that its **Opportunity Fixed Income Strategy** has again been named to the celebrated *PSN Top Guns List* of best performing separate accounts, managed accounts, and managed ETF strategies for Q2 2022. The highly anticipated list, published by Zephyr, remains one of the most important references for investors and asset managers.

“With the growing interest in separately managed accounts, the PSN Top Guns List has attracted greater attention,” says Margaret Tobiasen, SVP of Data Distribution who cites PSN’s pioneering efforts as the first SMA database as the reason for the list’s popularity. Carret Asset Management has done remarkable work and we are pleased to include them as a top performer.”

Carret’s Opportunity Strategy was named Top Gun 3 star rating, meaning our Opportunity Strategy had one of the top ten returns for the three-year period in our respective universe. This is the 28th quarter that Carret’s Opportunity Strategy has achieved Top Gun status signifying consistent relative outperformance in the Managed Account Intermediate Fixed Income Universe.

The complete list of PSN Top Guns and an overview of the methodology can be located at <https://psn.fi.informais.com/>. Registration is required.

“During the first half of 2022, global fixed income markets experienced unprecedented challenges as a result of multi-decade high inflation. Central Banks responded by raising lending rates and reducing money supplies, which lead to negative returns during the first half. Our team’s focus on “getting paid to take risk”, preservation of principal, credit research, and risk adjusted returns, added value on a relative basis. We are pleased to be recognized for our team’s hard work during these challenging times. While global uncertainty continues to create volatility, our Opportunity Strategy is poised to capitalize on opportunities that arise in the 2nd half of 2022. We value the responsibility our clients have placed in us and continue to strive for excellence”, said Jason Graybill, CFA and Neil Klein, Co-Directors of Fixed-Income Strategy at CAM.

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 \$3.3 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 one mutual fund.



About PSN

For nearly four decades, [PSN](#) has been a top resource for investment professionals. Asset managers rely on Zephyr's PSN to effectively reach institutional and retail investors rely. Over 2,800 firms, 285 universes, and more than 21,000 products comprise the PSN SMA database showing asset breakdowns, compliance, key personnel, ownership diversity, ESG, business objectives and strategy, style, fees, GIC sectors, fixed income ranges and full holdings. Unique to PSN is its robust historical database of **nearly 40 Years of Data Including Net and Gross-of-Fee Returns**. For more details on the methodology behind the PSN Top Guns Rankings or to purchase PSN Top Guns Reports, contact Margaret Tobiasen at Margaret.tobiasen@informa.com. Visit [PSN online](#) to learn more.

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.

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