

## **Carret Asset Management Has Two Fixed Income Strategies Recognized as PSN Top Gun Performers**

*Tuesday August 29, 2017 4:30pm*

New York, NY August 29, 2017 – Carret Asset Management, LLC (CAM) today announced that two of its Fixed Income Strategies have achieved PSN Top Guns status by Informa Investment Solutions for the second quarter of 2017. CAM was recognized for its **Taxable Fixed-Income Strategy** and its **Opportunity Fixed-Income Strategy**. Carret’s Taxable Fixed-Income Strategy has been awarded a six star Top Gun designation reflecting returns above the PSN style benchmark and low standard deviation compared with the peer group. Carret’s Opportunity Strategy has achieved Top Gun status for 5 consecutive quarters demonstrating consistent relative outperformance in the Core Fixed Universe and Intermediate Maturity Universe.

“We are proud to have two of our strategies 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 Fixed-Income Opportunity Strategy is designed to generate a high level of current income with a focus on long term capital appreciation.”

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 \$2.4 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](mailto:flevering@carret.com).  
Additional information is available at Carret’s website [www.carret.com](http://www.carret.com).***

*Please Note: Neither rankings and/or recognition by unaffiliated rating services, publications, or other organizations, nor the achievement of any designation or certification, should be construed by a client or prospective client as a guarantee that he/she will experience a certain level of results if Carret is engaged, or continues to be engaged, to provide investment advisory services. Rankings published by magazines, and others, generally base their selections exclusively on information prepared and/or submitted by the recognized adviser. Rankings are generally limited to participating advisers. No ranking or recognition should be construed as a current or past endorsement of Carret by any of its clients.*

*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.*

*Carret’s Chief Compliance Officer remains available to address any questions regarding rankings and/or recognitions, including providing the criteria used for any reflected ranking.*