

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

Friday February 28, 2020 4:00 pm EST

New York, NY – Carret Asset Management, LLC (CAM) today announced that its **Opportunity Fixed Income Strategy** has again achieved PSN Top Guns status by Informa Investment Solutions for the fourth quarter of 2019. Carret's Opportunity Strategy has been awarded a three star Top Gun designation reflecting returns above the PSN style benchmark and low standard deviation compared with the peer group. This is the 13th quarter that Carret's Opportunity Strategy has achieved Top Gun status signifying consistent relative outperformance in the Managed Account Intermediate Fixed Income Universe.

"We are once again proud to have our custom active fixed-income strategy recognized for this achievement, as it validates the hard work our team is doing" said Jason Graybill, CFA and Neil Klein, Co-Directors of Fixed-Income Strategy at CAM. "Our Opportunity Strategy seeks to generate a high level of current income with a focus on long term capital appreciation via opportunistic sector rotation across both investment grade and high yield bond markets."

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 well-respected 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 \$2.9 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 Informa Financial Intelligence's Zephyr

Financial Intelligence, part of the Informa Intelligence Division of Informa plc, is a leading provider of products and services helping financial institutions around the world cut through the noise and take decisive action. Informa Financial Intelligence's solutions provide unparalleled insight into market opportunity, competitive performance and customer segment behavioral patterns and performance through specialized industry research, intelligence, and insight. IFI's Zephyr portfolio supports asset allocation, investment analysis, portfolio construction, and client communications that combine to help advisors and portfolio managers retain and grow client relationships. For more information about IFI, visit <https://financialintelligence.informa.com>. For more information about Zephyr's PSN Separately Managed Accounts data, visit <https://financialintelligence.informa.com/products-and-services/data-analysis-and-tools/psn-sma>.

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.

***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. Information is subject to change without notice.

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.