

## **Carret Asset Management's Fixed-Income Strategies Recognized as PSN Top Gun Performers**

**Monday December 23, 2019 3:00 pm EST**

New York, NY – Carret Asset Management, LLC (CAM) today announced that two of its Fixed Income Strategies have again achieved PSN Top Guns status by Informa Investment Solutions for the third quarter of 2019. CAM was recognized for its **Taxable Fixed-Income Strategy** and its **Opportunity Fixed-Income Strategy**. Carret's Taxable Strategy and Opportunity Strategy have been awarded a five star and three star Top Gun designation, respectively, reflecting returns above the PSN style benchmark and low standard deviation compared with the peer group. This is the 12<sup>th</sup> quarter that Carret's Opportunity Strategy has achieved Top Gun status and the 10<sup>th</sup> quarter that Carret's Taxable Strategy has achieved Top Gun status signifying consistent relative outperformance in the Managed Account Intermediate Fixed Income & US Fixed Income Universes.

“We are once again proud to have our custom active fixed-income strategies recognized for this achievement,” 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.” Frank Levering, CFA, Portfolio Manager, adds that “the Taxable Bond Strategy continues to perform well from a risk return perspective. In a challenging low rate environment, our focus on fundamental credit research allows us to maximize yield to maturity while maintaining a prudent level of interest rate and credit risk.”

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 \$2.9 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>.*

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*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.*