

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

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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 first quarter of 2021. Carret's Opportunity Strategy has been awarded a one star (quarterly) and two star (1 year) Top Gun designation reflecting returns above the PSN style benchmark and low standard deviation compared with the peer group. This is the 16th quarter that Carret's Opportunity Strategy has achieved Top Gun status signifying consistent relative outperformance in the Managed Account Intermediate Fixed Income Universe.

“Record low interest rates have driven many investors to “*buy yield regardless of risk*”. In contrast, our focus on both total return and risk management has benefited our risk-adjusted performance. We remain patiently positioned with a higher quality bias and shorter duration in the face of ever tightening credit spreads. When volatility inevitably returns, we are well positioned to capitalize on it”, said Jason Graybill, CFA and Neil Klein, Co-Directors of Fixed-Income Strategy at CAM.

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 \$3.0 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.