



Carret Asset Management Named to PSN Top Guns List of Best Performing Strategies for the Past Three Years

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

Thursday September 21, 2023 9:00 am EST

New York, NY – Carret Asset Management, LLC announced today 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 2Q 2023.

“The past three years have seen complex issues evolve across the fixed-income landscape. While the future is never clear, our commitment to adhering to our disciplined investment philosophy and process has never wavered. While we are always proud to receive quarterly recognition, we truly value the three year Top Guns award. We are long term investors focused on risk and reward and this award specifically focuses on what our team works diligently on every day. We value the responsibility our clients have placed in us and are appreciative of the PSN Top Guns recognition”, said Jason Graybill, CFA and Neil Klein, Co-Directors of Fixed-Income Strategy at Carret.

“Volatility in the market continues to drive investors to actively managed investments like SMAs,” says Chris Volpe, Director of Wealth Management Solutions for Zephyr. “PSN Top Guns provides the intelligence and insight to identify strategies that align with client goals. Carret Asset Management’s Opportunity Strategy is a best-in-class performer and worthy of this influential recognition.”

Through a combination of PSN’s proprietary performance screens, the [PSN Top Guns List](#) ranks products in six proprietary categories in over 75 universes based on continued performance over time.

Carret’s Opportunity Strategy was named Top Guns 1 star, 2 star, and 3 star rating, meaning their Opportunity Strategy had one of the top ten returns for the quarter, one-year period, and three-year period in their respective strategy. This is the 32nd quarter that Carret’s Opportunity Strategy has achieved Top Guns 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.



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 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 Robby Resendez at PSNdata@informais.com. Visit [PSN online](#) to learn more.*

For more information about Carret Asset Management, LLC contact David Bancroft at 212.207.2332 or dbancroft@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.