



Carret Asset Management Named to PSN Top Guns List of Best Performing Strategies for 1Q 2023

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

Monday May 22nd, 2023 4:00 pm EST

New York, NY – Carret Asset Management, LLC today announced 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 1Q 2023. Additionally, Carret’s **Enhanced Cash Strategy** was again named a PSN Top Guns performer. The highly anticipated list, published by Zephyr, remains one of the most important references for investors and asset managers.

“With the growing interest in separately managed accounts, the PSN Top Guns List has attracted greater attention,” says Margaret Tobiasen, SVP of Data Distribution who cites PSN’s pioneering efforts as the first SMA database as the reason for the list’s popularity.

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 3 star rating, meaning their Opportunity Strategy had one of the top ten returns for the three-year period in their respective strategy. Carret’s Enhanced Cash Strategy was named Top Guns 2 star rating, meaning their Enhanced Cash Strategy had one of the top ten returns for the one-year period in their respective strategy. This is the 30th quarter that Carret’s Opportunity Strategy has achieved Top Guns status signifying consistent relative outperformance in the Managed Account Intermediate Fixed Income Universe. Furthermore, this is the second time their Enhanced Cash Strategy has achieved Top Guns status demonstrating relative outperformance in the Managed Account US Fixed Income Universe.

“While 2023 has been marked by numerous challenges – inverted yield curves, debt ceiling discussions, continued and stubborn inflation, declining corporate earnings, and the ongoing Ukraine/Russian war – it has also been marked by opportunities with elevated short-term interest rates and market volatility creating unique investment opportunities. After 2022 produced the worst bond market in 40+ years, the 4th Q of 2022 and 1st Q of 2023 experienced positive returns. We believe the worst is behind us and opportunities lie ahead. Our team is working hard to deliver value in times of uncertainty. 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.



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 Margaret Tobiasen at Margaret.tobiasen@informa.com. Visit [PSN online](#) to learn more.

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.