



## **Carret Asset Management Named to PSN Top Guns List of Best Performing Strategies for 4Q 2022**

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

*Wednesday March 1<sup>st</sup>, 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 4Q 2022. Additionally, Carret’s **Enhanced Cash Strategy** was named a PSN Top Guns performer for the first time. 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 our Opportunity Strategy had one of the top ten returns for the three-year period in our respective universe. Carret’s Enhanced Cash Strategy was named Top Guns 2 star rating, meaning our Enhanced Cash Strategy had one of the top ten returns for the one-year period in our respective universe. This is the 29<sup>th</sup> quarter that Carret’s Opportunity Strategy has achieved Top Guns status signifying consistent relative outperformance in the Managed Account Intermediate Fixed Income Universe.

“During 2022, global economies experienced unprecedented inflationary pressures. Central Banks responded with record monetary tightening. After the worst bond market in 40+ years, the 4<sup>th</sup> Q of 2022 experienced stabilization and positive performance. Our team’s focus on preservation of principal, credit research, and risk adjusted returns, added value on a relative basis. While global uncertainty continues, our Opportunity Strategy is poised to capitalize on opportunities that arise in 2023. Our Enhanced Cash Strategy is benefiting from the aggressive monetary tightening which has pushed interest rates higher. “We value the responsibility our clients have placed in us and appreciate the opportunity to help them achieve their investment goals”, 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](mailto:Margaret.tobiasen@informa.com). Visit [PSN online](#) to learn more.*

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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.*