



Carret Asset Management Named to PSN Top Guns List of Best Performing Strategies for 1Q 2024

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

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New York, NY - Carret Asset Management, LLC announced today its **Opportunity Fixed Income Strategy** and **Enhanced Cash Strategy** have again been named to the *PSN Top Guns List* of best performing separate accounts, managed accounts, and managed ETF strategies for 1Q 2024.

“PSN Top Guns award winners are honored for exceptional performance. Showcasing these strategies within a dedicated peer universe provides essential insight for advisors, institutions, plan sponsors, family offices and wealth managers interested in incorporating SMAs into their clients’ portfolios,” says Nick Williams, Product Manager of PSN at Zephyr. “It is because of this that this quarter marks the first time that [PSN Top Guns](#) is now openly accessible.”

“During the 1st quarter, both our Enhanced Cash and Opportunity SMA Strategies were named top performers. With inflation lingering, the economy slowing, and elections upon us, now is not the time to be complacent. We are proud of our team for delivering award-winning investment performance. Our Opportunity Strategy was named Top Guns 1 star, 2 star, and 3 star rating, meaning the Opportunity Strategy had one of the top ten returns for the quarter, one-year period, and three-year period in the respective strategy. This is the 35th quarter that our Opportunity Strategy has achieved Top Guns status signifying consistent outperformance relative to PSN’s Intermediate Fixed Income Universe. Furthermore, this is the 5th quarter that Carret’s Enhanced Cash Strategy has achieved Top Guns status. As always, we value the responsibility our clients have placed upon 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.

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

The complete list of PSN Top Guns and an overview of the methodology can be located at <https://informaconnect.com/zephyr/psn-top-guns/>.

About Carret Asset Management, LLC

Founded in 1963, Carret Asset Management, LLC, is an independent investment advisor headquartered in New York City. Carret manages \$3.139 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

<https://informaconnect.com/zephyr/psn-financial-sma-data/>

For nearly four decades, <https://informaconnect.com/zephyr/psn-financial-sma-data/> has been a top resource for investment professionals. Asset managers rely on Zephyr's PSN to effectively reach institutional and retail investors. 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. [PSN Mid-Year Outlook](#) provides insight and trends about the SMA industry. You can view in online [here](#).

Visit [PSN online](#) to learn more.

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