



## Carret Asset Management Named to PSN Top Guns List of Best Performing Strategies for 1Q 2025

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

*Tuesday May 27, 2025 10:00 am ET*

New York, NY - Carret Asset Management, LLC announced today its **Opportunity Fixed Income Strategy** and **Taxable Fixed Income Strategy** have again been named to the *PSN Top Guns List* of best performing separate accounts, managed accounts, and managed ETF strategies for 1Q 2025.

"Q1 2025 presented a fascinating market narrative marked by significant rotation and global shifts. Success demanded adaptability, deep market understanding, and strategic positioning," says PSN Product Manager Nick Williams. "PSN Top Guns managers demonstrated exceptional skill in navigating these complex dynamics, where value sectors outperformed growth, international markets showed strength, and policy shifts created both challenges and opportunities. Their expertise in reading and responding to these evolving market conditions continues to showcase the enduring value of active management in separately managed accounts."

"Flexibility and quick decision making are top of mind for portfolio managers as inflation lingers, the economy slows, and President Trump's tariff policy increases volatility. We are proud of our team for delivering an award-winning investment performance in this environment. As always, we value the responsibility our clients have placed upon us and are proud of the PSN Top Guns recognition", said Jason Graybill, CFA and Neil Klein, Co-Directors of Fixed-Income Strategy at Carret. Carret's Opportunity Strategy was named to the Top Guns 3-year category, which recognizes top ten returns for the three-year period in the strategy. This is the 39<sup>th</sup> quarter that the Opportunity Strategy has achieved Top Guns status signifying consistent outperformance relative to PSN's Intermediate Fixed Income Universe. Furthermore, Carret's Taxable Fixed Income Strategy received the 4, 5, and 6-star awards marking the 11<sup>th</sup> time it has appeared on PSN's Top Guns list. "Our mantra of remaining patient and seeing through the noise while capitalizing on market fluctuations allowed us to outperform in today's challenging environment", said Frank Levering, CFA, Portfolio Manager of the Taxable Fixed Income Strategy.

Through a combination of PSN's proprietary performance screens, [PSN Top Guns](https://informaconnect.com/zephyr/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. As of March 31<sup>st</sup>, 2025, Carret manages \$3.259 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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