



Carret Asset Management Named to PSN Top Guns List of Best Performing Strategies for 1Q 2026

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

Monday June 1st, 2026 4:00 pm ET

New York, NY - Carret Asset Management, LLC announced that on May 19th its **Taxable Fixed Income Strategy** and **Enhanced Cash Strategy** have been named to the *PSN Top Guns List* of best performing separate accounts, managed accounts, and managed ETF strategies for 1Q 2026.

“Q1 2026 presented a dynamic market environment characterized by early uncertainty that intensified with geopolitical developments in late February, including military action in Iran, creating both challenges and opportunities for skilled active managers,” says PSN Product Manager Nick Williams. “PSN Top Guns managers excelled by navigating the quarter’s evolving landscape—from initial market hesitancy through the geopolitical shock and its ripple effects on energy markets—while positioning strategically amid persistent inflation concerns and shifting Fed expectations. Their ability to adapt quickly across asset classes while maintaining discipline throughout this volatile period demonstrates the distinct value of active management in SMAs. As markets transitioned from uncertainty to managing geopolitical risks and sticky inflation, these managers proved their worth by preserving capital during turbulent periods and strategically identifying opportunities as conditions evolved, delivering value when it mattered most.”

“Consistent cash flows, competitive yield levels, and positive sector tilts have been integral to the performance of the strategy through a volatile and uncertain market environment” said Frank Levering, CFA, Portfolio Manager of the Taxable Fixed Income Strategy. Carret’s Taxable Fixed Income Strategy received the 5 and 6-star awards in both the Intermediate Fixed Income Universe as well as the US Fixed Income Universe. This marks the 15th time it has appeared on PSN’s Top Guns list. “Disciplined allocations across market segments and rigorous credit research are central to our Enhanced Cash strategy, allowing for a strong focus on liquidity, stability, and cash flows.” said Brendan Devine, CFA Level 1 Candidate, Portfolio Manager of the Enhanced Cash Strategy. Carret’s Enhanced Cash Strategy received the 1st Quarter award for 2026 in the US Fixed Income Universe. This marks the 9th time it has appeared on PSN’s Top Guns list.



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. As of March 31st, 2026, Carret manages \$3.518 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.

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.

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