



Carret Asset Management Named to PSN Top Guns List of Best Performing Strategies for 2Q 2026

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 that on August 26th its **Taxable Fixed Income Strategy** has been named to the *PSN Top Guns List* of best performing separate accounts, managed accounts, and managed ETF strategies for 2Q 2026.

“On behalf of YCharts, I want to extend my congratulations to this quarter's PSN Top Guns winners for their outstanding performance during a particularly challenging period for investment managers,” says President and CEO of YCharts, Sean Brown. “The second quarter tested even seasoned professionals, as markets shifted from early optimism to a more challenging environment that caught many portfolios off guard. What distinguishes these winners is their disciplined approach and ability to navigate uncertainty with conviction. They positioned portfolios with precision and delivered standout results when it counted most. As we look ahead, we're more excited than ever about the future of the SMA space. Our PSN Top Guns winners are leading the way in demonstrating what's possible when skill meets the right investment vehicle. We're committed to supporting this growth and helping investors and advisors connect with the exceptional talent that can deliver meaningful outcomes for their clients.”

“Volatility and uncertainty have dominated the bond market throughout 2026. Carret’s focus on quality investments, duration management, and opportunistic positioning has been integral to the positive performance of the strategy” 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 16th 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 June 30th, 2026, Carret manages \$3.737 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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