



Carret Asset Management Named to PSN Top Guns List of Best Performing Strategies for 3Q 2025

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 November 18th 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 3Q 2025.

"Q3 2025 delivered strong broad-based market gains, creating opportunities for skilled active managers," says PSN Product Manager Nick Williams. "PSN Top Guns managers excelled by capitalizing on the market's broadening rally and navigating the Fed's policy pivot effectively. Their ability to position strategically across asset classes while maintaining discipline during this positive environment demonstrates the distinct value of active management in SMAs. As markets responded favorably to accommodative monetary policy and resilient fundamentals, these managers proved their worth by not just participating in the rally, but by strategically positioning to capture opportunities across the expanding opportunity set."

"In an environment where domestic inflation is persistent, global growth is decelerating, credit spreads remain near historic lows (tights), and debt levels continue to grow, active management continues to offer opportunities. We remain focused on the short and long term, coupled with a focus on value and risk. As always, we value the responsibility our clients have placed upon us and share the PSN Top Guns recognition with our entire team", 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 41th 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 5 and 6-star awards in both the Intermediate Fixed Income Universe as well as the US Fixed Income Universe. This marks the 13th time it has appeared on PSN's Top Guns list. "We continue to prioritize in-depth credit and market research to anticipate and capitalize on economic and company specific trends", said Frank Levering, CFA, Portfolio Manager of the Taxable Fixed Income Strategy.



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 September 30th, 2025, Carret manages \$3.522 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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