



Carret Asset Management Named to PSN Top Guns List of Best Performing Strategies for 4Q 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 February 18th its **Taxable Fixed Income Strategy** has again been named to the *PSN Top Guns List* of best performing separate accounts, managed accounts, and managed ETF strategies for 4Q 2025.

"These managers have successfully steered through transformative events such as the COVID-19 pandemic market crash, the Brexit referendum, the US-China trade war, the global sell-off of 2015-2016, and the AI Driven market this year", says PSN Product Manager Nick Williams. "Their ability to adapt to evolving market conditions, strategically position across asset classes, and capture opportunities underscores the enduring importance of active management in delivering value to investors."

"Steady duration management coupled with our focus on 'knowing what you own' has allowed for consistent outperformance versus the strategy benchmark" 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.

Carret earned PSN Top Guns 5 Star and 6 Star ratings. For details on Carret's current PSN Top Guns awards and an overview of the methodology please visit: https://psn.fi.informais.com/PSNTopGuns/topguns_firm_zephyr.asp?iv=GNPHHIJK

About Carret Asset Management, LLC

Founded in 1963, Carret Asset Management, LLC, is an independent investment advisor headquartered in New York City. As of December 31st, 2025, Carret manages \$3.466 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, PSN 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.



For more information about Carret Asset Management, LLC contact Frank Levering at 212.207.2331 or fllevering@carret.com. Additional information is available at Carret's website www.carret.com.

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

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

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Carret's Chief Compliance Officer remains available to address any questions regarding rankings and/or recognitions, including providing the criteria used for any reflected ranking.