

Merlin Asset Management Named to PSN Top Guns List of Best Performing Strategies for 3Q 2023

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

NEWPORT, RI, UNITED STATES, December 14, 2023 /EINPresswire.com/ -- Merlin Asset

“

The Top Guns Manager designation continues to validate our structured, high active share, and low turnover Merlin IP approach to investing”

Michael Obuchowski, Ph.D.

Management announced today it has been named to the prestigious [PSN Top Guns List](#) of best-performing separate accounts strategies for 3Q 2023. The highly anticipated list, published by Zephyr, remains one of the most important references for investors and asset managers.

"Investing in SMAs has grown substantially over the past decade," says Chris Volpe, Director of Wealth Management Solutions for Zephyr. "Zephyr's PSN SMA database pioneered the curation of SMA data and is the leader in

providing important due diligence on strategies. Merlin Asset Management is a best-in-class performer worthy of this influential recognition."

Merlin Asset Management was named a Top Gun with star ratings of 2 and 3 for the Merlin Focus SMID Cap Growth MSMID25 investment strategy, a 3-star rating for the Merlin SMID Cap Growth MSMID50 investment strategy, and 2-, 3- and 4-star ratings for the Merlin Focused Growth MO25M Large Cap Growth investment strategy. In addition, the Merlin Focus SMID Cap Growth MSMID25 and the Merlin SMID Cap Growth MSMID50 investment strategies were recognized as PSN Bull & Bear Masters.

"We are honored by the Top Guns designation for Merlin Asset Management's SMID Cap Growth and Large Cap Growth Equity investment strategies. This is the 10th consecutive year and 14th consecutive quarter of PSN Top Guns designation for one or more of Merlin Asset Management's investment strategies. All of Merlin's investment strategies are designed to provide consistent long-term exposure to what we consider to be the best high-quality SMID cap and large-cap growth companies. To achieve that goal, we apply Merlin's Investment Process (Merlin IP) across the capitalization spectrum to create a series of Merlin Portfolios with a range of capitalization

and risk-return characteristics. We feel that the Top Guns Manager designation continues to validate our structured, high conviction, high active share, and low turnover Merlin IP approach to investing," said Michael Obuchowski, Ph.D., Founder and Chief Investment Officer of Merlin Asset Management. "We believe that Merlin's investment strategies are well positioned for the future and will continue to successfully offer true active equity management for both individual and institutional investors.

Through a combination of PSN's proprietary performance screens, the PSN Top Guns List ranks products in six proprietary categories in over 75 universes based on continued performance over time. Top Guns firms are awarded a rating ranging from one to six stars, with the number of stars representing continued performance over time.

2-Star Category: had one of the top ten returns for the one-year period in their respective strategy.

3-Star Category: had one of the top ten returns for the three-year period in their respective strategy.

4-Star Category: had an r-squared of 0.80 or greater relative to the style benchmark for the recent five-year period. Moreover, the strategy's returns exceeded the style benchmark for the three latest three-year rolling periods. The top ten returns for the latest three-year period then become the 4 Star Top Guns.

Bull & Bear Masters: had an r-squared of 0.80 or greater relative to the style benchmark for a three-year period. Moreover, the strategy had an upside market capture of over 100 and a downside market capture of less than 100 relative to the style benchmark. The top ten ratios of the Upside Capture Ratio over the Downside Capture Ratio become the PSN Bull & Bear Masters.

The complete list of PSN Top Guns and an overview of the methodology can be located at <https://psn.fi.informais.com/>. Registration is required.

About Merlin Asset Management

Merlin Asset Management is an independent, employee-owned investment management firm. Merlin Asset Management develops and manages modern institutional-style investment portfolios. The Merlin Growth Strategy invests in what we believe are the most attractive, fast-



growing, high-quality companies, targeting 10-15% annualized returns over an economic cycle. To achieve that goal, we apply Merlin's Investment Process (Merlin IP) across the capitalization spectrum to create a series of Merlin Portfolios with a range of capitalization and risk-return characteristics. Merlin Asset Management's Portfolios consist of carefully curated Small Cap Growth, SMID Cap Growth, and Large Cap Growth companies with shares traded on the US exchanges. Merlin Portfolios are characterized by high conviction, high active share, and low turnover.

[About PSN](#)

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 details on the methodology behind the PSN Top Guns Rankings or to purchase PSN Top Guns Reports, contact Robby Resendez at PSNdata@informais.com Visit PSN online to learn more.

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