

Kingsview Wealth Management Named to PSN Top Guns List of Best Performing Strategies for 4Q 2023

Quarterly PSN Top Guns List Published by Zephyr Identifies Best-In-Class Separate Accounts, Managed Accounts, and Managed ETF Strategies



KINGSVIEW
WEALTH MANAGEMENT

CHICAGO, IL, UNITED STATES, February

29, 2024 /EINPresswire.com/ -- Kingsview Wealth Management, LLC ("Kingsview") announced today that it has been named to the celebrated PSN Top Guns List of best-performing separate accounts, managed accounts, and managed ETF strategies for 4Q 2023. The highly anticipated list, published by Zephyr, remains one of the most important references for investors and asset managers.

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We're proud to receive this recognition from the PSN Top Guns List, which highlights our commitment to delivering strong performance and value to our clients.”

*Scott Martin, Kingsview CIO
and Portfolio Manager*

"Making it onto the PSN Top Guns List highlights our commitment to delivering strong performance and value to our clients. We're proud to receive this recognition and remain focused on providing customized investment solutions to meet our clients' diverse needs." - Scott Martin, Kingsview CIO and Portfolio Manager.

- Kingsview's Blue Chips Elite strategy was named Top Gun 5 Star and Top Gun 6 Star rating in the US Growth Universe.

Blue Chips Elite is a Large Cap Growth strategy consisting of 12 individual stocks that attempts to outperform the S&P 500 Index with concentrated positioning in the most fundamentally strong companies within the index as ranked by the proprietary model.

- Kingsview's Dividend Plus strategy was named Top Gun 4 Star, Top Gun 5 Star, and Top Gun 6 Star rating in the Large Value Universe, and Top Gun 5 Star and Top Gun 6 Star rating in the US Value Universe.

Dividend Plus is a Large Cap Value portfolio that aims to build a portfolio of 30 high-quality

dividend paying value stocks while minimizing overall large cap volatility and delivering constant dividend cashflows.

- Kingsview's Multi-Strat Aggressive strategy was named Top Gun 4 Star rating in the US Balanced Universe.

Multi-Strat Aggressive is a US-based ETF asset allocation strategy that attempts to outperform a traditional multi-asset index by positioning investments utilizing a group of asset classes featuring style diversification. The goal is to create a more attractive risk-based allocation by overweighting or underweighting asset classes that are desirable or undesirable for investment.

For a full listing of and information about Kingsview strategies, please visit <https://kingsviewim.com/strategy-cards/>.

"As the needs and viewpoints of investors are becoming more diverse, investment advisors must incorporate strategies capable of being customized to their client's goals. SMA strategies are becoming increasingly important as an efficient tool to provide custom investment solutions for portfolios of all sizes and saw asset growth of over 19% in 2023. It is also increasingly important for managers to identify quality SMA strategies. Zephyr PSN has been helping advisors find quality products for 40 years, and achieving Top Gun status confirms that Kingsview has outperformed their peers in a meaningful way," said Nick Williams, Product Manager of PSN at Zephyr.

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.

- A Top Gun 4 Star rating means the strategy 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.
- A Top Gun 5 Star rating means the strategy 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. Products are then selected which have a standard deviation for the five-year period equal or less than the median standard deviation for the peer group. The top ten returns for the latest three-year period then become the 5 Star Top Guns.
- A Top Gun 6 Star rating means the strategy 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. Products are then selected which have a standard deviation for the five-year period equal or less than the median standard deviation for the peer group. The top ten information ratios for the latest five-year period then become the 6 Star Top Guns.

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

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About Kingsview

Kingsview Wealth Management is a fee-based Registered Investment Advisor that serves thousands of individual clients across the nation through independent advisor offices. The firm's advisory business is complemented by our full-service insurance agency, Kingsview Trust and Insurance. Kingsview Investment Management, our standalone asset manager, provides investment portfolios to meet various client needs.

Kingsview Wealth Managers have a suite of options that include third-party money managers, insurance carriers, platform providers and custodians. Kingsview Partners maintains custodial relationships with Charles Schwab & Co., Raymond James & Associates and Interactive Brokers.

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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