

Merlin Asset 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

NEWPORT, RI, UNITED STATES, June 10, 2024 /EINPresswire.com/ -- 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 individual and institutional investors"

Michael Obuchowski, Ph.D.

announced today it has been named to the prestigious [PSN Top Guns List](#) of best-performing separate accounts strategies for 4Q 2023. The highly anticipated list, published by Zephyr, remains one of the most important references for investors and asset managers.

" 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 have seen 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 Merlin Asset Management has outperformed its peers in a meaningful way." Said Nick Williams Product Manager of PSN at Zephyr.

Merlin Asset Management was named a Top Gun with a 3-star rating 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.

"We are proud to receive the PSN Top Guns designation for our SMID Cap Growth and Large Cap Growth Equity strategies for the fourth quarter of 2023. This marks the 11th consecutive year and 15th consecutive quarter that Merlin Asset Management has been recognized with this prestigious accolade for one or more of our strategies. Our dedication to providing consistent, long-term exposure to top-tier SMID cap and large-cap growth companies is a cornerstone of our

investment philosophy. Utilizing Merlin's Investment Process (Merlin IP), we develop a diversified range of portfolios across different capitalization and risk-return profiles. This recognition underscores the efficacy of our structured, high-active share, and low-turnover investment approach. We are confident that our strategies will continue to deliver strong results and offer robust active equity management for individual and institutional clients," said Michael Obuchowski, Ph.D., Founder and Chief Investment Officer of Merlin Asset Management.

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.

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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