

Merlin Asset Management Named to PSN Top Guns List of Best Performing Strategies for 3Q 2024

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 12, 2024 /EINPresswire.com/ -- Merlin Asset



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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 2024. The highly anticipated list, published by Zephyr, remains one of the most important references for investors and asset managers.

"PSN Top Guns award winners are honored for exceptional performance. Showcasing these strategies within a dedicated peer universe provides essential insight for advisors, institutions, plan sponsors, family offices, and

wealth managers interested in incorporating SMAs into their clients' portfolios," says Nick Williams, Product Manager of PSN at Zephyr. "It is because of this that PSN Top Guns reports have been openly accessible since Q1 2024."

Merlin Asset Management was named a Top Gun with a 4-star rating for the Merlin Focused Growth MO25M Large Cap Growth investment strategy.

"Merlin Asset Management is proud to receive another Top Guns designation for our Large Cap Growth Equity strategies. This marks our 11th consecutive year earning a PSN Top Guns designation. This recognition validates our long-standing commitment to providing consistent exposure to high-quality growth companies across the market capitalization spectrum. Merlin's Investment Process (Merlin IP) emphasizes a structured, high-active share and low turnover approach to achieve this goal. This consistent philosophy is applied across our Merlin Portfolios, offering a range of risk-return profiles for individual and institutional investors. We are confident that Merlin's strategies remain well-positioned to deliver true active equity management and superior returns for our clients in the future," 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.

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://informaconnect.com/zephyr/psn-top-guns/>.

[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](#)

PSN has been a top resource for investment professionals for nearly four decades. 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.



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