

Merlin Asset Management Named to PSN Top Guns List of Best Performing Strategies for 4Q 2024

Merlin Asset Management has been named to the prestigious PSN Top Guns List of best-performing separate accounts strategies for the 11th consecutive year.

NEWPORT, RI, UNITED STATES, March 28, 2025 /EINPresswire.com/ -- Merlin Asset Management



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Michael Obuchowski, Ph.D.

announced today it has been named to the prestigious [PSN Top Guns](#) List of best-performing separate accounts strategies for the 11th consecutive year. The highly anticipated list, published by Zephyr, remains one of the most important references for investors and asset managers.

Merlin's SMID Cap Growth (MSMID50) strategy earned a PSN Top Guns 1-Star award for 4Q 2024, meaning MSMID50 had one of the top ten returns for the quarter in PSN's Small-Mid (SMID) Cap Growth Universe consisting of 54 Firms and 70 Products.

"Merlin Asset Management is proud to be recognized with a PSN Top Guns designation for our MSMID50 Portfolio and validates our long-standing commitment to providing consistent exposure to high-quality growth companies across the market capitalization spectrum," said Michael Obuchowski, Ph.D., Founder and Chief Investment Officer of Merlin Asset Management. "The MSMID50 Portfolio identifies the 50 most attractive SMID-cap growth companies regardless of industry or sector. Merlin's Investment Process (IP) is a comprehensive multivariate approach, emphasizing a structured, high-active share with low turnover. High-quality companies that pass this repeatable selection process have significant profitability and earnings growth opportunities, sustainable competitive advantages, and trade at what we believe are attractive valuations relative to their expected earnings growth. This consistent philosophy is applied across our Merlin Portfolios, offering a range of risk-return profiles for 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.

"The final quarter of 2024 was defined by both volatility and resilience. Success in these markets required relentless effort, rigorous research, and disciplined execution. 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."

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](#)

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. PSN Mid-Year Outlook provides insight and trends about the SMA industry. You can view it online here. Visit PSN online to learn more.



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