

Heron Bay Capital Management Named to PSN Top Guns List of Best Performing Strategies for Fourth Quarter 2024

BLOOMFIELD HILLS, MI, UNITED STATES, May 21, 2025

/EINPresswire.com/ -- Heron Bay Capital Management announced today it has been named to the prestigious PSN Top Guns List of best-performing separate account strategies as of fourth quarter 2024. The highly anticipated list, published by Zephyr, remains one of the most important references for investors and asset managers to compare performance across peer groups.

"Heron Bay Capital Management is proud to be recognized with a PSN Top Guns designation for several of our equity portfolios! The PSN Top Guns designation validates that high conviction portfolios centered around quality and price discovery can have a meaningful impact on long-term outcomes" said Gerald Seizert, Managing Partner at Heron Bay.



Four of HBCM's proprietary equity strategies were named Top Gun for three different star categories:

3 Star Awards - Large Cap Select and U.S. Small & Micro Capitalization strategies earned the PSN Top Guns 3 Star Award, indicating that these strategies had one of the top ten returns for the three-year period in their respective category.

2 Star Awards - U.S. Small to Mid Capitalization (SMID), Large Cap Select earned 2 Star Awards for having one of the top ten returns for the one-year period in their respective category.

1 Star Awards - SMID, Large Cap Select, U.S. Small & Micro each earned Top Guns 1 Star Awards for having one of the top ten returns for the quarter.

“Heron Bay’s investment process identifies high quality businesses based on fundamentals, regardless of industry or sector. The investment team independently seeks to understand the business drivers and economic realities of a business, adjusting financials to overcome the limitations of GAAP accounting. With this understanding of cash efficiency, balance sheet strength, management incentives, and more, the investment team creates high conviction portfolios using a repeatable framework geared towards long timeframes. This investment process is disciplined, independent, and does not rely on macroeconomic judgements. We believe that quality businesses should exert their competitive advantages over significant durations” said Joseph Ashmore, Director of Research and Partner at Heron Bay.

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 Heron Bay Capital Management

Heron Bay Capital Management is an independent, employee-owned investment management firm. Heron Bay Capital Management develops and manages institutional-style investment portfolios using proprietary blend of quantitative and qualitative tools that focus on risk management, quality, valuation, and sentiment. Heron Bay’s portfolios are characterized by high conviction, high active share, and low turnover. Heron Bay Capital Management serves institutional investors, family offices, other registered investment advisors and high-net-worth individuals.

For more information about Heron Bay Capital Management, visit www.heronbaycap.com.

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](#).

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