

# Heron Bay Capital Management Named to PSN Top Guns List of Best Performing Strategies for Q1 2025

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/EINPresswire.com/ -- Heron Bay Capital Management ("HBCM") announced today it has been named to the celebrated PSN Top Guns List of best performing separate account strategies for Q1 2025. The highly anticipated list, published by Zephyr, remains one of the most important references for investors and asset managers.

"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.

Three of HBCM's proprietary equity strategies earned PSN Top Guns awards across several categories.

6-Star Category – U.S. Systematic Small Micro ("Small Micro") 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.

5-Star Category - Small Micro 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.

4-Star Category - Small Micro 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.

3-Year Category - Small Micro and U.S. Systematic Large Cap Select earned an award in the 3-Year Category, indicating that they had one of the top ten returns for the three-year period in their respective strategy.

1-Year Category - U.S. Small and Mid Cap ("SMID"), Small Micro, and U.S. Systematic Large Cap Select each earned an award in the 1-Year Category, indicating that they had one of the top ten returns for the one-year period in their respective strategy.

1-Quarter Category - SMID had one of the top ten returns for the quarter in the respective strategy.

"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 long timeframes" 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

HBCM 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 HBCM, visit [www.heronbay.com](http://www.heronbay.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 in online here.

Visit PSN online to learn more.

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