Heron Bay Capital Management Announces #1 Ranking for Large Cap Select Strategy

Heron Bay announced that its Large Cap Select strategy has achieved the top ranking across four key performance and risk-adjusted metrics.

BLOOMFIELD HILLS, MI, UNITED STATES, April 20, 2026 /EINPresswire.com/ -- Heron Bay Capital Management today announced that its Large Cap Select strategy has achieved the top ranking across four key performance and risk-adjusted metrics within the Lipper U.S. Large Cap Core peer group, which includes 581 managers. The recognition reflects the strategy's consistent ability to generate strong absolute and risk-adjusted returns since inception and underscores the firm's disciplined, process-driven investment approach.

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>
> *Chet Rastogi*

Heron Bay achieved the top ranking in the following categories.

#1 Annualized Return - Ranked 1st of 581 strategies in the Lipper U.S. Large Cap Core peer group for annualized total return for the period ended December 31, 2025. Provided by LSEG Lipper, an independent rating service. No compensation was paid in connection with obtaining or using this ranking. Past performance does not guarantee future results.

#1 Alpha Generation - Ranked 1st of 581 strategies for alpha generation for the period ended December 31, 2025. Provided by LSEG Lipper. No compensation was paid. Past performance does not guarantee future results.

#1 Sharpe Ratio - Ranked 1st of 581 strategies for Sharpe ratio for the period ended December 31, 2025. Provided by LSEG Lipper. No compensation was paid. Past performance does not guarantee future results.

#1 Information Ratio - Ranked 1st of 581 strategies for information ratio for the period ended December 31, 2025. Provided by LSEG Lipper. No compensation was paid. Past performance does not guarantee future results.

"We are honored to be recognized at the top of a highly competitive peer group across both return and risk-adjusted measures. While absolute performance is important, rankings in Sharpe ratio and information ratio are particularly meaningful to us, as they reflect the consistency and efficiency with which returns have been generated. Ultimately, these results are not abstract metrics. They represent outcomes experienced directly within our clients' portfolios. That alignment remains our primary focus", said Chetan Rastogi, Partner and Portfolio Manager.

The Large Cap Select strategy invests in high-quality businesses trading at a discount to intrinsic value, with a long-term orientation designed to perform across full market cycles. The strategy combines proprietary quantitative models with fundamental analysis to address limitations in traditional GAAP-based reporting. It systematically evaluates companies within the Russell 1000, adjusting for accounting distortions, business quality, intangible investments & assets, and risk to identify mispriced opportunities. The result is a concentrated portfolio of businesses with durable competitive advantages and asymmetric return profiles, supported by disciplined portfolio construction and risk management.

The strategy is benchmark-agnostic and total-return oriented, with risk defined as the permanent impairment of capital rather than short-term volatility or tracking error. The most meaningful aspect of this recognition, according to Heron Bay, is what it reflects for client portfolios. Strong risk-adjusted metrics such as Sharpe ratio and information ratio indicate that the strategy is delivering on its objective of compounding capital efficiently over time without assuming disproportionate risk.

The firm remains focused on executing its repeatable investment process: identifying high-quality businesses trading below intrinsic value, constructing concentrated portfolios with asymmetric upside, and maintaining the long-term discipline required to generate differentiated results.

Paul Seizert
Heron Bay Capital Management
+1 248-970-0900
email us here
Visit us on social media:
LinkedIn
