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Merlin Asset Management Earns Eight PSN Top Guns Awards for Q1 2026, Including New Three-Year Distinctions

Merlin honored for 13th consecutive year; Dynamic and Focused Growth earn new 3-Year recognitions; Dynamic Growth outperforms benchmark by 38+ points for 1 year

NEWPORT, RI, UNITED STATES, June 25, 2026 /EINPresswire.com/ -- Merlin Asset Management, an independent investment firm specializing in concentrated, high-conviction growth strategies, announced today it has been named to the celebrated PSN Top Guns List of best-performing separate accounts for Q1 2026. The firm earned eight distinctions across its three concentrated 25-stock strategies within the PSN Large Growth and Small-Mid Growth Universes. This marks the 13th consecutive year Merlin has been honored on PSN's quarterly lists, a service from leading investment data provider Zephyr.

> "Earning eight distinctions across our three concentrated strategies, including new three-year recognitions, validates the sustained strength of our conviction-driven investment process."
>
> *Michael Obuchowski, Ph.D.*

A notable development this quarter, both Merlin Dynamic Growth (MO25V) and Merlin Focused Growth (MO25M) earned 3-Year category recognition in the Large Growth Universe, a distinction reflecting sustained, multi-year outperformance rather than short-term results.

The highly anticipated list, published by Zephyr, remains a key reference for investors and asset managers. PSN Top Guns rankings are calculated by Zephyr using its proprietary methodology, based on returns for the period ending March 31, 2026.

PSN Large Growth Universe -- 6 Distinctions

Merlin Dynamic Growth (MO25V) earned top-ten recognition for the 1-Quarter, 1-Year, and 3-Year periods in the Large Growth Universe. For the year ending March 31, 2026, MO25V returned 60.66% net of fees versus 22.46% for the Invesco S&P 500 Pure Growth ETF benchmark -- an outperformance of more than 38 percentage points. Over the trailing three years, the strategy returned 25.26% annualized net of fees versus 16.24% for the benchmark.

Merlin Focused Growth (MO25M) also earned 1-Quarter, 1-Year, and 3-Year distinctions in the Large Growth Universe. For the year, MO25M returned 50.61% net of fees versus 22.46% for the benchmark, with a trailing three-year annualized net return of 25.51% versus 16.24% for the benchmark.

Merlin Asset Management

PSN Small-Mid Growth Universe -- 2 Distinctions

Merlin Focus SMID Cap Growth (MSMID25) earned 1-Quarter and 1-Year recognition in the Small-Mid Growth Universe. For the year ending March 31, 2026, MSMID25 returned 59.68% net of fees versus 24.10% for its custom blended benchmark -- an outperformance of more than 35 percentage points. For the most recent quarter, the strategy returned 8.96% net of fees versus 4.79% for the benchmark.

"We are honored to receive eight distinctions across all three of our concentrated strategies for the first quarter of 2026, and we are especially pleased by the new three-year recognitions for our Dynamic Growth and Focused Growth strategies," said Michael Obuchowski, Ph.D., Founder and Chief Investment Officer of Merlin Asset Management. "Three-year results speak to consistency and process, not a single strong quarter. Each of our strategies holds just 25 high-conviction positions, and this concentrated approach is central to our ability to generate meaningful outperformance. The breadth of recognition across both our large-cap and SMID growth strategies validates our approach across the capitalization spectrum."

The PSN Top Guns List ranks products in six proprietary categories in over 75 universes based on continued performance over time:

1-Quarter Category (1 Star): The strategy ranked in the top ten within its respective universe based on quarterly returns.

1-Year Category (2 Stars): The strategy ranked in the top ten for one year in its respective universe.

3-Year Category: The strategy passed increasingly rigorous screens for sustained performance over the trailing three-year period.

A complete overview of the PSN Top Guns methodology is available at https://psn.fi.informais.com/PSNTopGuns/topguns_zephyr.asp

To learn more about Merlin's award-winning strategies and unique investment process, visit www.merlinam.com.

Important Disclosures

Third-Party Rating: The PSN Top Guns rankings are created, calculated, and tabulated by Zephyr, a subsidiary of Informa plc (LSE: INF). Rankings are for Q1 2026, based on the period ending March 31, 2026, and are published quarterly. Rankings are based on strategy returns reported to the PSN database. Merlin Asset Management did not pay a fee to participate in the ranking or in connection with obtaining or using the third-party rating.

GIPS Compliance: Merlin Asset Management claims compliance with the Global Investment Performance Standards (GIPS). Each strategy referenced herein is maintained as a separate GIPS composite. To obtain a compliant presentation, contact Merlin Asset Management.

Performance: Performance is presented gross- and net-of-fees. All periods greater than one year are annualized. Gross returns are gross of management fees and net of transaction costs. Net returns are net of actual management fees and transaction costs. Results are based on fully discretionary accounts, including those no longer with the firm. Inception dates: MO25V -- October 31, 2012; MO25M -- November 30, 2012; MSMID25 -- December 31, 2019. The standard fee schedule is 1.35% on assets up to $1M, 1.00% from $1M-$5M, 0.80% from $5M-$10M, and negotiable above $10M. MO25V and MO25M are benchmarked against the Invesco S&P 500 Pure Growth ETF (RPG). MSMID25 is benchmarked against a custom blend of 50% Invesco S&P MidCap 400 Pure ETF (RFG) and 50% Invesco S&P SmallCap 600 Pure Growth ETF (RZG). ETF expense ratios: 0.35% as of March 2026.

Past performance is not indicative of future results. Investing involves risk, including the potential loss of principal. The PSN Top Guns rankings do not represent the experience of any individual client.

About Merlin Asset Management

Merlin Asset Management is an independent, employee-owned investment management firm that builds concentrated, high-conviction portfolios of the world's most innovative growth companies. Our approach is different by design, born from our founder's journey from clinical psychology to finance. We blend a data-driven investment process with insights from neuroscience to mitigate cognitive biases and identify opportunities others may miss. The result is a suite of benchmark-agnostic, low-turnover strategies built to deliver superior, long-term returns.

About PSN

For over four decades, PSN has been a premier resource for investment professionals. The PSN SMA database comprises over 2,800 firms, 285 universes, and more than 21,000 products with over 40 years of historical data.

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