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Donoghue Forlines' DF Tactical Momentum Strategy Earns PSN Top Guns Recognition for 1-Quarter, 1-Year & 3-Year Periods

The DF Tactical Momentum Strategy ranked in the top 10 out of 917 strategies in the Large Cap Universe for three consecutive time periods

BOSTON, MA, UNITED STATES, July 9, 2026 /EINPresswire.com/ -- Donoghue Forlines today announced that its DF Tactical Momentum strategy has been named to the PSN Top Guns list for Q1 2026, published by Zephyr. The strategy ranked in the top 10 out of 917 strategies in the Large Cap Universe across three time periods (1-Quarter, 1-Year, and 3-Year) based on gross returns through March 31, 2026. Gross returns for each period were 18.0% (Q1 2026), 57.2% (trailing 1-year), and 29.2% (trailing 3-year); net of 3% returns were 17.1%, 52.6%, and 25.4%, respectively. The PSN Top Guns list is one of the investment industry's most closely watched quarterly rankings, drawing on a database of more than 2,800 firms and 21,000 products across 285 separate account universes.

"Q1 2026 presented a dynamic market environment characterized by early uncertainty that intensified with geopolitical developments in late February, including military action in Iran, creating both challenges and opportunities for skilled active managers," said Nick Williams, PSN Product Manager. "PSN Top Guns managers excelled by navigating the quarter's evolving landscape, from initial market hesitancy through the geopolitical shock and its ripple effects on energy markets, while positioning strategically amid persistent inflation concerns and shifting Fed expectations. Their ability to adapt quickly across asset classes while maintaining discipline throughout this volatile period demonstrates the distinct value of active management in SMAs. As markets transitioned from uncertainty to managing geopolitical risks and sticky inflation, these managers proved their worth by preserving capital during turbulent periods and strategically identifying opportunities as conditions evolved, delivering value when it mattered most."

The DF Tactical Momentum strategy is a rules-based separately managed account (SMA) that seeks moderately aggressive capital appreciation. It invests in large and mid-cap companies with strong intermediate-term, risk-adjusted price momentum and includes tactical overlays designed to shift toward a more defensive posture during severe market downturns.

"An 18% quarter and 57% trailing year, both ranking top 10 out of 917 strategies in the Large Cap Universe, reflects exactly what the strategy is built to do: stay positioned in high-momentum names and let the rules-based process manage the risk," said Jeff Thompson, CEO, Donoghue Forlines.

Q1 2026 Performance

The DF Tactical Momentum strategy returned 18.0% (gross) / 17.1% (net of 3%) in Q1 2026, ranking among the top 10 strategies in the PSN Large Cap Universe of 917 strategies. The strategy remained fully invested in equities throughout the quarter. Momentum stocks outperformed most other factors during the period, and the strategy's rules-based process kept it positioned to participate in that strength. Over the trailing 12 months ended March 31, 2026, the strategy returned 57.2% (gross) / 52.6% (net of 3%). Over the trailing 3 years ended March 31, 2026, the strategy returned 29.2% (gross, annualized) / 25.4% (net of 3%, annualized). The strategy's technical signals would require a rapid deterioration in price action before triggering a shift to a more defensive allocation, a threshold that was not reached during the quarter.
About the PSN Top Guns Recognition

PSN Top Guns awards are granted across six proprietary performance categories and more than 75 universes, using PSN's proprietary screening methodology. All returns used for ranking are gross of fees. The DF Tactical Momentum strategy earned recognition in the following categories within the Large Cap Universe (917 strategies) for periods ended March 31, 2026:

- 1-Quarter Category: 18.0% gross / 17.1% net of 3% return, top 10 out of 917 strategies
- 1-Year Category: 57.2% gross / 52.6% net of 3% return, top 10 out of 917 strategies
- 3-Year Category: 29.2% gross / 25.4% net of 3% annualized return, top 10 out of 917 strategies

The complete PSN Top Guns list and methodology are available at psn.fi.informais.com.
To learn more about the DF Tactical Momentum strategy, visit DonoghueForlines.com.

About Donoghue Forlines LLC

Donoghue Forlines is an SEC-registered investment advisor founded in 1986. The firm manages rules-based, tactically-driven strategies for individual investors, corporations, and institutions, including retirement plans and trusts. Its investment approach is grounded in the belief that a static buy-and-hold posture is insufficient for clients who need to both grow and preserve wealth over time.

About PSN / Zephyr

For more than four decades, PSN has been a primary resource for investment professionals evaluating separately managed account strategies. Zephyr's PSN database covers more than 2,800 firms, 285 universes, and 21,000 products, with over 40 years of net and gross-of-fee return history. Learn more at informaconnect.com/zephyr.

Important Disclosures

In May 2026, Zephyr identified the DF Tactical Momentum strategy as a PSN Top Guns award recipient in the Large Cap Universe for the quarter, trailing 1-year, and trailing 3-year periods ended March 31, 2026. This recognition is based on gross performance. A total of 917 strategies were included in the Large Cap Universe; 2,800 firms and 21,000 products are included across all 285 PSN universes. PSN Top Guns award criteria are determined each quarter; the DF Tactical Momentum strategy may receive a different award designation or no recognition in future periods. For the most current information, contact Donoghue Forlines at (800) 642-4276 or info@donoghueforlines.com.

All performance figures cited are gross of fees unless otherwise noted. Net of 3% returns are presented net of a hypothetical maximum fee of three percent (3%). Actual fees applicable to an individual investor's account will vary and no individual investor's account will vary and no individual investor may incur a fee as high as 3%. Please consult your financial adviser for fees applicable to your account.

Donoghue Forlines believes that any questionnaire or survey used by Zephyr in the preparation of third-party ratings is structured to make it equally easy for a participant to provide favorable and unfavorable responses and is not designed to produce any predetermined result. Donoghue Forlines has compensated Zephyr in connection with using this third-party recognition. Donoghue Forlines is not affiliated with Zephyr.

Past performance does not guarantee future results. All investments involve risk, including potential loss of principal. The DF Tactical Momentum strategy's tactical overlays are designed to help manage downside risk but cannot eliminate it.

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