



Zacks Investment Management Named to PSN Top Guns List of Top Performing Strategies*

Quarterly PSN Top Guns List published by Zephyr identifies top performing separate accounts, managed accounts, and managed ETF strategies.

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CHICAGO, ILLINOIS — Zacks Investment Management announced today it has been named to the celebrated PSN Top Guns List of top performing separate accounts, managed accounts, and managed ETF strategies for Q2 2024. The list, published by Zephyr, can be an important reference for investors and asset managers.

“Successful investment strategies are the result of enormous effort, research and hard work,” says PSN Product Manager Nick Williams. “PSN Top Guns shines a light on the very best. The teams and managers behind each product showcase why SMAs continue to grow in today’s economic climate.”

The Zacks Focus Growth Strategy was named the PSN Top Guns Manager of the Decade. This title is earned by strategies with an r-squared of 0.80 or greater relative to the style benchmark for the latest 10-year period, returns greater than the style benchmark for the latest 10-year period, and standard deviation less than the style benchmark for the latest ten-year period. With these qualifications, the top ten performers for the latest 10-year period become the PSN Top Guns Manager of the Decade.

Through a combination of PSN’s proprietary performance screens, the PSN Top Guns also awards products in six proprietary categories in over 75 universes based on continued performance over time.

Both the Zacks Focus Growth Strategy and the Zacks Mid-Cap Core Strategy earned PSN Top Guns 6-star awards. This means each strategy had an r-squared of 0.80 or greater relative to the style benchmark for the recent five-year period, returns that exceeded the style benchmark for the three latest three-year rolling periods, and a standard deviation for the five-year period equal or less than the median standard deviation for the peer group. These strategies ranked in the top ten information ratios for the latest five-year period, earning them the 6 Star Top Guns award.

“Once again earning the PSN Top Guns Manager of the Decade and 6-Star rankings is a testament to the enduring value of our investment process. These large- and mid-cap strategies have had particular success in Q2 2024, but they are representative of a growing suite of products built on a solid foundational methodology.”

Mitch Zacks, MBA

CEO, Senior Portfolio Manager

The complete list of PSN Top Guns and an overview of the methodology can be located at <https://psn.fi.informais.com/>.

*PSN FG MOTD Ranking: This rating was awarded by PSN on 8/19/2024 in respect of the period 1/1/2014 to 12/31/2023. We do not compensate PSN to obtain this rating. However, we pay compensation to PSN to use their logo in connection with advertising this rating. **Please see full disclosure at end of this document.**

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About Zacks Investment Management

Zacks Investment Management is an independent, boutique firm established in 1992. As a wholly owned subsidiary of one of the largest and most influential independent research firms in the U.S., Zacks Investment Research, we focus on data-driven investing customized to the needs of our clients. By channeling the insights of our parent firm, we seek to help investors methodically reduce risk and improve returns over time.

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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PSN RANKING: This information is distributed for informational purposes only; to notify readers of a PSN ranking. The results submitted to PSN portray the performance history for a strategy composite gross of fees, and do not include the deduction of investment advisory fees. An investor's actual return will be reduced by the advisory fees and any other expenses which may be incurred in the management of an investment advisory account. Upon request, Zacks Investment Management will provide gross and net performance information for the Zacks Focus Growth Strategy. The returns are compared to the Russell 1000 Growth Index. The composite may differ significantly from the securities that comprise the Index. Individual results may differ. PSN and Informa Investment Solutions have no affiliation with Zacks, but rather evaluate investment managers' performance on an objective basis. Criteria: The PSN universes were created using the information collected through the PSN investment manager questionnaire and use only gross of fee returns. Mutual fund and commingled fund products are not included in the universe. PSN Top Guns investment managers must claim that they are GIPS compliant. Products must have an r-squared of 0.80 or greater relative to the style benchmark for the ten-year period ending DECEMBER 31, 2023. Moreover, products must have returns greater than the style benchmark for the ten-year period ending DECEMBER 31, 2023 and also standard deviation less than the style benchmark for the ten year period ending DECEMBER 31, 2023. At this point, the top ten performers for the latest ten-year period ending DECEMBER 31, 2023 become the PSN Top Guns Manager of the Decade. This rating was awarded by PSN on 8/19/2024 in respect of the period 1/1/2014 to 12/31/2023. We do not compensate PSN to obtain this rating. However, we pay compensation to PSN to use their logo in connection with advertising this rating.

The PSN Categories used for comparative analysis are constructed by PSN (median performance) and data is provided to Zacks by PSN. The peer groups were created using the information collected through the PSN investment manager questionnaire and uses only gross of fee returns. PSN Top Guns investment managers must claim that they are GIPS compliant. Products must have an R-Squared of 0.80 or greater relative to the style benchmark for the recent five year period. Moreover, products must have returns greater than 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 TOP GUNS. Other managers included in the category by PSN may exhibit style drift when compared to Zacks Investment Management portfolio. Neither Zacks Investment Management nor Zacks Investment Research has any affiliation with PSN. Neither Zacks Investment Management nor Zacks Investment Research had any influence of the process PSN used to determine this rating. This rating was awarded by PSN on 8/19/2024 in respect of the period from 7/1/2019 to 6/30/2024 We do not compensate PSN to obtain this rating. However, we pay compensation to PSN to use their logo in connection with advertising this rating.