



Two Zacks Investment Management Strategies Named to the PSN Manager of the Decade List for Q4 2024*

Quarterly PSN SMA ranking list published by Zephyr identifies some of the industry's top performing separate accounts, managed accounts, and managed ETF strategies.

Release Date:

April 16, 2025

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 Q4 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 All Cap Core Strategy and Zacks Mid Cap Core Strategy were named PSN Top Guns Managers 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.

“Once again earning the PSN Top Guns Manager of the Decade is a testament to the enduring value of our investment process. These large- and mid-cap strategies have had particular success in Q4 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/PSNTopGuns/topguns_decade_zephyr.asp.

***PSN RANKING:** These ratings were awarded by PSN on 4/11/2025 in respect of the period 1/1/2015 to 12/31/2024. 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. **Please see full disclosure at end of this document.**

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 it online [here](#).

Visit [PSN online](#) to learn more.

DISCLOSURE

Past performance is no guarantee of future results. Inherent in any investment is the potential for loss.

Zacks Investment Management, Inc. is a wholly-owned subsidiary of Zacks Investment Research. Zacks Investment Management is an independent Registered Investment Advisory firm and acts as an investment manager for individuals and institutions. Zacks Investment Research is a provider of earnings data and other financial data to institutions and to individuals.

This material is being provided for informational purposes only and nothing herein constitutes investment, legal, accounting or tax advice, or a recommendation to buy, sell or hold a security. Do not act or rely upon the information and advice given in this publication without seeking the services of competent and professional legal, tax, or accounting counsel. Publication and distribution of this article is not intended to create, and the information contained herein does not constitute, an attorney-client relationship. No recommendation or advice is being given as to whether any investment or strategy is suitable for a particular investor. It should not be assumed that any investments in securities, companies, sectors or markets identified and described were or will be profitable. All information is current as of the date of herein and is subject to change without notice. Any views or opinions expressed may not reflect those of the firm as a whole.

Any projections, targets, or estimates in this report are forward looking statements and are based on the firm's research, analysis, and assumptions. Due to rapidly changing market conditions and the complexity of investment decisions, supplemental information and other sources may be required to make informed investment decisions based on your individual investment objectives and suitability specifications. All expressions of opinions are subject to change without notice. Clients should seek financial advice regarding the appropriateness of investing in any security or investment strategy discussed in this presentation.

Certain economic and market information contained herein has been obtained from published sources prepared by other parties. Zacks Investment Management does not assume any responsibility for the accuracy or completeness of such information. Further, no third party has assumed responsibility for independently verifying the information contained herein and accordingly no such persons make any representations with respect to the accuracy, completeness or reasonableness of the information provided herein. Unless otherwise indicated, market analysis and conclusions are based upon opinions or assumptions that Zacks Investment Management considers to be reasonable. Any investment inherently involves a high degree of risk, beyond any specific risks discussed herein. The S&P 500 Index is a well-known, unmanaged index of the prices of 500 large-company common stocks, mainly blue-chip stocks, selected by Standard & Poor's.

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 All Cap Core Strategy. The returns are compared to the Russell 3000 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, 2024. Moreover, products must have returns greater than the style benchmark for the ten-year period ending DECEMBER 31, 2024 and also standard deviation less than the style benchmark for the ten year period ending DECEMBER 31, 2024. At this point, the top ten performers for the latest ten-year period ending DECEMBER 31, 2024 become the PSN Top Guns Manager of the Decade. This rating was awarded by PSN on 4/11/2025 in respect of the period 1/1/2015 to 12/31/2024. 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.

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 Mid Cap Core Strategy. The returns are compared to the Russell Midcap 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, 2024. Moreover, products must have returns greater than the style benchmark for the ten-year period ending DECEMBER 31, 2024 and also standard deviation less than the style benchmark for the ten year period ending DECEMBER 31, 2024. At this point, the top ten performers for the latest ten-year period ending DECEMBER 31, 2024 become the PSN Top Guns Manager of the Decade. This rating was awarded by PSN on 4/11/2025 in respect of the period 1/1/2015 to 12/31/2024. 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.

The Russell 3000 Index is a well-known, unmanaged index of the prices of 3000 broad U.S. equity company common stocks, selected by Russell. The Russell 3000 Index assumes reinvestment of dividends but does not reflect advisory fees. An investor cannot invest directly in an index. The volatility of the benchmark may be materially different from the individual performance obtained by a specific investor.

The Russell Midcap Index is a well-known, unmanaged index of the prices of approximately 800 mid-cap company common stocks, selected by Russell. The Russell Midcap Index assumes reinvestment of dividends but does not reflect advisory fees. An investor cannot invest directly in an index. The volatility of the benchmark may be materially different from the individual performance obtained by a specific investor.