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Sawgrass Asset Management Named to PSN Top Guns List of Best Performing Strategies for Q2 2023

Quarterly PSN Top Guns List published by Zephyr identifies best-in-class separate accounts, managed accounts, and managed ETF strategies

Ponte Vedra Beach, FL—August 24, 2023— Sawgrass Asset Management announced today that it has been named to the celebrated *PSN Top Guns List* of best-performing separate accounts, managed accounts, and managed ETF strategies for Q2 2023. The highly anticipated list, published by Zephyr, remains an important reference for investors and asset managers.

“Volatility in the market continues to drive investors to actively managed investments like SMAs,” says Chris Volpe, Director of Wealth Management Solutions for Zephyr. “PSN Top Guns provides the intelligence and insight to identify strategies that align with client goals. Sawgrass Asset Management is a best-in-class performer and worthy of this influential recognition.”

High Quality Core Fixed Income – Top Gun 6 Star Rating – All Maturity/Variable Universe
Genesis Small Growth Equity – Bull & Bear Master – Small Cap Growth Universe
SMID Core Equity – Bull & Bear Master – Mid Core Equity Universe

“We are proud to be recognized by PSN for such an achievement. This acknowledgment affirms our belief in properly managing risk and providing superior risk-adjusted returns to our clients.”

- Alicia Dator, President of Sawgrass Asset Management

Through a combination PSN’s proprietary performance screens, the [PSN Top Guns List](#) ranks products in six proprietary categories in over 75 universes based on continued performance over time.

Sawgrass’ High Quality Core Fixed Income strategy was named Top Gun 6 Star rating, which is the highest star ranking; meaning our core fixed income strategy had an r-squared of 0.80 or greater relative to the style benchmark for the recent five-year period. Moreover, the strategy’s returns exceeded 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 to or less than the median standard deviation for the peer group. The top ten information ratios for the latest five-year period become the 6 Star Top Guns.



The Sawgrass High Quality Core Fixed Income product seeks superior risk-adjusted returns focusing on overall risk management. The product aims to outperform the Bloomberg Aggregate throughout various market cycles by maintaining a high-quality portfolio of investment-grade bonds.

Sawgrass' Genesis Small Growth Equity and SMID Core Equity strategies were both named Bull & Bear Masters for their respective universes, meaning both strategies had an r-squared of 0.80 or greater relative to the style benchmark for a three-year period. Moreover, the strategies had an upside market capture over 100 and a downside market capture less than 100 relative to the style benchmark. The top ten ratios of the Upside Capture Ratio over the Downside Capture Ratio become the PSN Bull & Bear Masters.

The Sawgrass Genesis Small Cap Growth and SMID Core products seek to exploit investor behavior that we believe leads to persistent overvaluation of companies experiencing rapid rates of change at the expense of those with more consistent, less volatile growth. Using our internally developed quantitative models and our experience with risk management techniques, we select leaders from their respective universes to build portfolios that provide consistent growth and downside protection.

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

[About Sawgrass Asset Management](#)

Sawgrass is a 100% employee-owned registered investment advisor based in Ponte Vedra Beach, Florida. The firm manages \$2.5 billion in Assets Under Advisement for institutional and high-net-worth clients. Founded in 1998, Sawgrass provides active growth and fixed-income investment management services. Our products are governed by our belief in achieving growth while managing risk, which produces a structured and repeatable process and has demonstrated added value to our clients 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 reach institutional and retail investors effectively. 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. For more details on the methodology behind the PSN Top Guns Rankings or to purchase PSN Top Guns Reports, contact Robby Resendez at PSNdata@informais.com.

Disclaimer: These awards and rankings should not be construed as a guarantee that a client will experience a certain level of results or satisfaction if they invest with us, nor should it be construed as a current or past testimonial by any of our current clients or an endorsement by any third-party. Sawgrass did not pay a fee to participate in these awards and rankings.