

Zephyr



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LM Capital Group Named to PSN Top Guns List of Best Performing Strategies for Q3 2022

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

San Diego, CA November 28, 2022— **LM Capital Group** announced today it has been named to the celebrated *PSN Top Guns List* of best performing separate accounts, managed accounts, and managed ETF strategies for Q3 2022. The highly anticipated list, published by Zephyr, remains one of the most important references for investors and asset managers.

“With the growing interest in separately managed accounts, the PSN Top Guns List has attracted greater attention,” says Margaret Tobiasen, SVP of Data Distribution who cites PSN’s pioneering efforts as the first SMA database as the reason for the list’s popularity. “LM Capital Group has done remarkable work and we are pleased to include them as a top performer.”

“It’s an honor to be recognized with the 5-Star Top Gun rating,” said LM Capital Portfolio Manager, Mike Chalker. “Our Core Plus strategy, a flagship product at the firm, encompasses what we do best at LM Capital. Our multi-sector fixed income products provide some of the best risk adjusted returns for our clients and often thrive in tough market environments such as today.”

“Our growing team of portfolio managers and analysts certainly deserve credit for these outstanding results,” Chalker continued.

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

Core Plus 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 or less than the median standard deviation for the peer group. The top ten returns for the latest three-year period then become the 5 Star Top Guns.

The Emerging Market Debt Strategy had one of the top ten returns for the three-year period in their respective strategy.

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 LM Capital Group

LM Capital Group, LLC is a minority owned, boutique-style fixed income asset manager. The firm currently has 22 employees servicing \$4.5 billion in assets under management. There are five portfolio managers, all of whom make up the Investment Strategy Group, responsible for making the key decisions regarding portfolio positioning. All assets are managed in separately managed accounts and are customized to meet individual client guidelines and objectives. The firm prides itself on making the portfolio managers readily accessible to client inquiries, quick responses to client requests, and customizing reports to fit client formats.

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 rely. 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 Margaret Tobiasen at Margaret.tobiasen@informa.com. Visit [PSN online](#) to learn more.