

Zephyr



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## **LM Capital Group Awarded 6-Star Top Gun Rating by PSN Top Guns List of Best Performing Strategies for Q4 2023**

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

**San Diego, CA February 28, 2024**— **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 Q4 2023. The highly anticipated list, published by Zephyr, remains one of the most important references for investors and asset managers.

*“As the needs and viewpoints of investors are becoming more diverse, investment advisors must incorporate strategies capable of being customized to their client’s goals. SMA strategies are becoming increasingly important as an efficient tool to provide custom investment solutions for portfolios of all sizes and have seen asset growth of over 19% in 2023. It is also increasingly important for managers to identify quality SMA strategies Zephyr PSN has been helping advisors find quality products for 40 years and achieving Top Gun status confirms that LM Capital Group has outperformed their peers in a meaningful way.”* Said Nick Williams Product Manager of PSN at Zephyr.

“It’s an honor to be recognized with the 6-Star Top Gun rating,” said LM Capital Senior Portfolio Manager, Mike Chalker. “Our Core Plus strategy, a flagship product at the firm, encompasses what we do best at LM Capital and 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 information ratios for the latest five-year period then become the 6 Star Top Guns.

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 \$5.0 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 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. 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](mailto:PSNdata@informais.com) Visit [PSN online](#) to learn more.