



Angie Vargas
LM Capital Group
avargas@lmcapital.com
(619) 514-1401

LM Capital Group Awarded 6-Star Top Gun Rating by PSN Top Guns List of Best Performing Strategies for 4Q 2024

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

San Diego, CA—February 24, 2025— 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 4Q 2024. The highly anticipated list, published by Zephyr, remains one of the most important references for investors and asset managers.

“Successful investment strategies demand relentless effort, in-depth research, and disciplined execution,” says PSN Product Manager Nick Williams. “PSN Top Guns highlights the elite managers and teams whose expertise continues to drive the growth of SMAs in today’s dynamic economic environment.”

“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 of PSN’s proprietary performance screens, [PSN Top Guns](#) awards 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://informaconnect.com/zephyr/psn-top-guns/>.

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 \$5.76 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.

<https://informaconnect.com/zephyr/psn-financial-sma-data/>

For nearly four decades, <https://informaconnect.com/zephyr/psn-financial-sma-data/> 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.