

For immediate release

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## **Altman Investment Management Named PSN Top Guns Manager For Investment Performance**

**Princeton, New Jersey** – Altman Investment Management is pleased to announce its Large Cap Core Value Equity and Balanced strategies have been awarded a PSN Top Guns distinction by Informa Financial Intelligence’s PSN manager database, North America’s longest-running database of investment managers. This designation recognizes the top 10 performers in the peer group for the period ending March 31, 2019.

“We are honored to receive a 5-star and 4-star Top Gun rating for our Large Cap Core Value Equity and Balanced investment programs respectively. We are proud that these distinctions reflect on our long-standing asset allocation, stock selection and risk management discipline that have been in place since our inception”, said Peter Altman, President of Altman Investment Management. “Our team’s diligent work, conviction in our investment process, and unwavering client focus are some of the key attributes that define who we are.”

Through a combination of Informa Financial Intelligence’s proprietary performance screens, PSN Top Guns ranks products in six proprietary categories in over 50 universes. This is a well-respected quarterly ranking and is widely used by institutional asset managers and investors. Informa Financial Intelligence is part of Informa plc, a leading provider of critical decision-making solutions and custom services to financial institutions.

Top Gun firms are awarded a rating ranging from one to six stars, with the number of stars representing continued performance over time.

Altman’s Large Cap Core Value Equity program earned Top Guns status in the 5 Star (U.S. Value Universe) and in the 4 Star (Large Value Universe) categories, which represent top ten returns for the 3-year period ending March 31, 2019, respectively. In addition, the Core Value Balanced composite, a combination of large cap U.S. equities and investment-grade fixed income securities, earned Top Guns status in the 4 Star (U.S. Balanced Universe) designation, representing top ten returns over the same time period.

“Congratulations to Altman Investment Management for being recognized as a PSN Top Gun,” said Ryan Nauman, Market Strategist at Informa Financial Intelligence’s Zephyr. “This highly esteemed designation allows us to recognize success, excellence and performance of leading investment managers each quarter.”

The complete list of PSN Top Guns and an overview of the methodology can be located on <https://psn.fi.informais.com/> . 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](mailto:Margaret.tobiasen@informa.com)

Altman Investment Management’s Large Cap Core Value Equity composite was also recognized in 2018 with PSN’s Bull & Bear Master designation (in the Large Cap Value Universe) for its performance in up and down markets relative to the performance of the broader market; specifically, for this category a product must have an R-Squared of 0.80 or greater relative to the style benchmark for a three-year period. Moreover, products must have an upside market capture over 100 and a downside market capture less than 100 relative to the style benchmark. “We are very pleased to have been recognized for our performance relative to risk. This is a feature that our clients appreciate during times of high volatility,” said Peter Altman.

**About Altman Investment Management:** The firm is an SEC Registered Investment Adviser, providing a suite of investment strategies for individual and institutional clients that include traditional equity, fixed income and balanced portfolios. For more information, visit [www.altmaninvest.com](http://www.altmaninvest.com). In addition to the PSN database, Altman Investment Management’s investment strategies can be found on the eVestment Alliance platform, another one of the largest research and investment databases in the industry.

**About Informa Financial Intelligence’s Zephyr:** Financial Intelligence, part of the Informa Intelligence Division of Informa plc, is a leading provider of products and services helping financial institutions around the world cut through the noise and take decisive action. Informa Financial Intelligence’s solutions provide unparalleled insight into market opportunity, competitive performance and customer segment behavioral patterns and performance through specialized industry research, intelligence, and insight. IFI’s Zephyr portfolio supports asset allocation, investment analysis, portfolio construction, and client communications that combine to help advisors and portfolio managers retain and grow client relationships. For more information about IFI, visit <https://financialintelligence.informa.com>. For more information about Zephyr’s PSN Separately Managed Accounts data, visit <https://financialintelligence.inform.com/products-and-services/data-analysis-and-tools/psn-sma>.

**Disclosure:** Past performance is not a guarantee of future results. Certain investments give rise to substantial risk and are not suitable for all investors. There is no guarantee that an investment with the referenced strategies will meet its investment goals and the rating may not be representative of any one client's experience. Altman Investment Management claims compliance with the Global Investment Performance Standards (GIPS®) and prepares performance data in compliance with GIPS standards and meets the requirements of the *CFA Institute* with regards to creating and reporting product composites. The performance results do not include simulated or model portfolios with actual performance. The ratings at PSN reflect the requirements of the GIPS standards published in the *GIPS Handbook* and are an average of all of the experiences of the manager's client base. All material provided is compiled from sources believed to be reliable and current, but accuracy cannot be guaranteed. The investment performance figures submitted to PSN portray the history for all separately managed portfolios that meet the composite definition gross of fees. The information presented herein should not be considered as personalized investment advice nor construed as a solicitation to buy or sell any security or engage in a particular investment strategy. PSN and Informa Financial Intelligence have no affiliation with Altman Investment Management, but rather evaluate investment managers' performance on an objective basis.