

NEWS RELEASE

FEBRUARY 20, 2023

For immediate release

For more information contact:
Peter Altman, President
Altman Investment Management
paltman@altman-investment.com
(609) 252-0048

Altman Investment Management Named to PSN Top Guns List of Best Performing Strategies for Q4'2022

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

Princeton, New Jersey – Altman Investment Management is pleased to announce its Fixed Income strategy has been awarded the celebrated PSN Top Guns distinction by Zephyr's PSN manager database, North America's longest-running database of investment managers. The highly anticipated list, published by Zephyr, remains one of the most important references for investors and asset managers, recognizing the top 10 performers in the peer group for the period ending December 31, 2022.

"We are honored to receive a 2-star Top Gun rating once again for our Fixed Income investment program. We are proud that this distinction reflects on our long-standing discipline of staying the course despite compelling arguments to the contrary. Our short duration high quality asset allocation reflected our belief that bonds were both overvalued - and would be subjected to elevated volatility associated with the uncertainty of a Fed policy response to a shift in long term inflationary expectations. The strategy to remain in the investment grade markets, and comparatively low duration, highlights our continued attention to risk management disciplines that are the hallmarks of our process." said Peter Altman, President of Altman Investment Management.

Through a combination of 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.

Altman's Fixed Income program earned Top Guns status in the 2 Star (Core Plus and Intermediate Core Plus Universes) category, which represents top ten returns for the one-year period ending December 31, 2022.

“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. “Altman Investment Management, LLC has done remarkable work and we are pleased to include them as a top performer.”

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 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. 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 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.

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.