

NEWS RELEASE

MAY 31, 2024

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 Q1 2024

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 Core Value Balanced and Fixed Income strategies have both 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 March 31, 2024.

“We are honored to receive a 3-star Top Gun rating for our Core Value Balanced and Fixed Income investment programs. We are proud that this distinction reflects on our long-standing discipline of staying the course despite compelling arguments to the contrary. Our balanced approach has helped mitigate risk in portfolios by maintaining a long-term perspective on the markets. We utilize top-down analysis in our equity portfolio construction in selecting stocks and diversifying our sector exposure. In terms of fixed income, our short duration high quality asset allocation continued to reflect 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 awards products in six proprietary categories in over 75 universes based on continued performance over time.

Altman’s Core Value Balance program earned Top Guns status in the 3-star (US Balanced Universe) category, which represents top ten returns for the three-year period ending March 31, 2024. Altman’s Fixed Income program earned Top Guns status in the 3-Star (Intermediate Core Plus Universe) category, which represents top ten returns for the three-year period ending March 31, 2024.

“PSN Top Guns award winners are honored for exceptional performance. Showcasing these strategies within a dedicated peer universe provides essential insight for advisors, institutions, plan sponsors, family offices and wealth managers interested in incorporating SMAs into their clients’ portfolios,” says Nick Williams, Product Manager of PSN at Zephyr. “It is because of this that this quarter marks the first time that [PSN Top Guns](#) is now openly accessible.”

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 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 Nasdaq eVestment platform, another one of the largest research and investment consultant 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. 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.

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.