ALTMAN INVESTMENT MANAGEMENT

PSN

NEWS RELEASE

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For immediate release

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Altman Investment Management Named to PSN Top Guns List of Best Performing Strategies for Q1 2025

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

Princeton, New Jersey – Altman Investment Management is pleased to announce its Core Value Fixed Income strategies have both been awarded, once again, 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.

"Q1 2025 presented a fascinating market narrative marked by significant rotation and global shifts. Success demanded adaptability, deep market understanding, and strategic positioning," says PSN Product Manager Nick Williams. "PSN Top Guns managers demonstrated exceptional skill in navigating these complex dynamics, where value sectors outperformed growth, international markets showed strength, and policy shifts created both challenges and opportunities. Their expertise in reading and responding to these evolving market conditions continues to showcase the enduring value of active management in separately managed accounts."

"We are honored to receive a 5 and 6-star Top Guns rating - respectively for our Intermediate Maturity and Core Plus 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. In terms of fixed income strategy, 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 Fixed Income program earned Top Guns status in two categories - **6-Star** for the Intermediate Core Plus Universe and **5-Star** for the Intermediate Maturity Universe. This recognition represents top ten returns within the respective strategy for the six and five-year periods ending March 31, 2025.

The complete list of PSN Top Guns and an overview of the methodology can be located at: https://psn.fi.informais.com/.

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 more than 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.

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