



Shaker Investments LLC Named to PSN Top Guns List of Best Performing Strategies for Q1 2022

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

Cleveland, OH—June 14, 2022— Shaker Investments LLC 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 Q1 2022. The highly anticipated list, published by Zephyr, remains one of the most important references for investors and asset managers.

“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. “Shaker Investments LLC has done remarkable work and we are pleased to include them as a top performer.”

Through a combination 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.

Shaker Investment’s Small Cap Growth strategy was named Top Gun 6 Star rating and Bulls & Bear Master. A 6 star rating means the Small Cap Growth strategy 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 Bulls & Bears mater means the Small Cap Growth strategy had an r-squared of 0.80 or greater relative to the style benchmark for a three-year period. Moreover, the strategy had an upside market capture over 100 and a downside market capture less than 100 relative to the style benchmark. The top ten ratios of Upside Capture Ratio over Downside Capture Ratio become the PSN Bull & Bear Masters.

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 Shaker Investments LLC

Shaker Investments is a Cleveland based asset manager founded in 1991 by current President Edward Hemmelgarn. The firm was founded on a clear investment mandate: to manage growth equity portfolios representing primarily small and mid-capitalization companies whose attributes we believe favor exceptional, long-term investment performance. Focused on fundamental research, our portfolio management team has an average of 21 years of experience in the investment management industry and 16 years working together at the firm.

[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.

Any designation referred to herein was made by a third-party, and although Shaker Investments, LLC has no reason to believe that such designation, or the criteria for being considered for such designation, are inaccurate or misleading, Shaker Investments, LLC has not independently verified the selection process and does not guarantee its completeness or accuracy. No compensation was paid in exchange for any such designation. This award is not a representation of any one client's experience. The Top Gun award is based on a rating ranging from one to six stars, with the number of stars representing continued performance over time. Shaker's Small Cap Growth won these awards in the Small-Cap Growth universe which included 122 firms and 147 strategies.

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