



## Shaker Investments Named to PSN Top Guns List of Best Performing Strategies for Q4 2024

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

**Cleveland, Ohio, March 11, 2025**— Shaker Investments 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 Q4 2024. The highly anticipated list, published by Zephyr, remains one of the most important references for investors and asset managers.

“The final quarter of 2024 was defined by both volatility and resilience, success in these markets required relentless effort, rigorous research, and disciplined execution,” says PSN Product Manager Nick Williams. “PSN Top Guns recognizes the top managers and teams whose expertise continues to drive the growth of SMAs amid today’s complex and rapidly evolving market conditions.”

The Shaker Small Cap Growth Strategy aims for long-term capital appreciation and outperformance of small-cap indices while maintaining a similar amount of risk. Through disciplined research and active management, we strive to identify high-potential opportunities to drive sustained growth.

*“We are absolutely thrilled and honored to receive the Manager of the Decade Award for the Shaker Small Cap Growth Strategy. This recognition reflects our unwavering commitment to our process and we couldn’t be more excited about the journey ahead as we continue to drive growth and create value for our investors!” – Edward Hemmelgarn, Co-CIO*

Through a combination 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.

Shaker Investment’s Small Cap Growth strategy earned a PSN Top Guns Manager of the Decade award, meaning our Small Cap Growth strategy had an r-squared of 0.80 or greater relative to the style benchmark for the latest 10-year period. Moreover, the strategy’s returns were greater than the style benchmark for the latest 10-year period and also standard deviation less than the style benchmark for the latest ten-year period. At this point, the top ten performers for the latest 10-year period become the PSN Top Guns Manager of the Decade.

Since inception, the Shaker Small Cap Growth Strategy has upheld a time-tested, long-term philosophy: rigorous research drives superior returns. With a focus on sustained growth, we identify high-potential small-cap companies in expanding industries, emphasizing strong fundamentals and clear catalysts to unlock enduring value for our investors.

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

#### **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: This award is not a representation of any one client's experience. Any designation referred to herein was made by a third party and Shaker Investments 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. In some cases, fees were paid for the use of marketing materials. The award should not be construed as an endorsement and is not indicative of future investment success or a wealth managers' future gains. The Shaker Small Cap Growth strategy won this awards in the Small-Cap Growth universe which included 122 firms and 148 strategies.