



## **Sterling Partners Equity Advisors Named Top Gun Manager for 4Q 2019 by Informa Investment Solutions**

(Chicago, Illinois—February 20, 2020) Sterling Partners Equity Advisors (“SPEA”) has been awarded Top Guns designations by Informa Investment Solutions’ PSN manager database for 4Q 2019.

SPEA offers small-cap value and large-cap value strategies to its clients. The Small-Cap Value Diversified strategy is a diversified, low-turnover, small-cap, value strategy holding 50-70 stocks with a 13-year GIPS compliant track record. The Sterling Quality Income & Value strategy, a fully diversified large-cap portfolio of 60-75 high-quality, income-producing companies with an 11-year GIPS compliant track record. The strategies have been managed since their inception by Kevin Silverman, CFA, SPEA’s CIO.\*

Sterling Partners Equity Advisors received awards in all of the following categories:

SCV Diversified	3 Stars	Small Cap Value Universe
SCV Diversified	4 Stars	Small Cap Value Universe
Quality Income & Value	4 Stars	Large Value Universe
Quality Income & Value	5 Stars	Large Value Universe
Quality Income & Value	5 Stars	US Value Universe
Quality Income & Value	6 Stars	Large Value Universe

**3-Star Category:** These products rank among the top ten performers within their respective universes, based on returns for the three-year period.

**4-Star Category:** These products had an r-squared of 0.80 or greater relative to the style benchmark for the recent five-year period. Moreover, returns must have exceeded the appropriate style benchmark for the three latest three-year rolling periods. The top ten returns for the latest three-year period then become the 4 Star Top Guns.

**5-Star Category:** These products had an r-squared of 0.80 or greater relative to the style benchmark for the recent five-year period. Moreover, products must have returns greater than 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 returns for the latest three-year period then become the 5 Star Top Guns.

**6-Star Category:** These products had an r-squared of 0.80 or greater relative to the style benchmark for the recent five-year period. Moreover, products must have returns greater than 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 returns for the latest five-year period then become the 6 Star Top Guns.



“It is very rewarding to post these steady results during such a volatile period in the market. I’m particularly pleased with our downside capture metrics and appreciate the good work of our investment team,” said Kevin Silverman.

The PSN manager database is one of North America’s longer-running databases of investment managers. PSN Top Guns ranks products in six proprietary categories in over 50 universes and is a well-respected quarterly ranking widely used by institutional asset managers and investors. Informa Investment Solutions is part of Informa Financial Intelligence, a leading provider of critical decision-making solutions and custom services to financial institutions. “Congratulations to Sterling Partners Equity Advisors for being recognized as a PSN Top Gun,” said [Ryan Nauman](#), **Market Strategist at Informa Financial Intelligence’s Zephyr**. “This highly esteemed designation allows us to recognize success, excellence and performance of leading investment managers each quarter.”

### **About Informa Financial Intelligence’s Zephyr**

Financial Intelligence, part of the Informa Intelligence Division of Informa plc, is a leading provider of products and services helping financial institutions around the world cut through the noise and take decisive action. Informa Financial Intelligence’s solutions provide unparalleled insight into market opportunity, competitive performance and customer segment behavioral patterns and performance through specialized industry research, intelligence, and insight. IFI’s Zephyr portfolio supports asset allocation, investment analysis, portfolio construction, and client communications that combine to help advisors and portfolio managers retain and grow client relationships. For more information about IFI, visit <https://financialintelligence.informa.com>. For more information about Zephyr’s PSN Separately Managed Accounts data, visit <https://financialintelligence.informa.com/products-and-services/data-analysis-and-tools/psn-sma>. 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](mailto:margaret.tobiasen@informa.com)

\*Performance prior to May 2017 occurred while the Portfolio Manager was affiliated with prior firms and the Portfolio Manager was the only or primary individual responsible for selecting the securities to buy and sell. The PSN manager database is one of North America’s longer-running databases of investment managers. Manager must be a SEC Registered Investment Adviser to be listed on the database. There is no fee required by Informa Investment Solutions for inclusion in the PSN manager database. PSN Top Guns performance rankings are tabulated for thousands of strategies across 58 peer groups subdivided by increasingly rigorous screens.