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Zevin Asset Management's Global Equity and Global Appreciation with Income Strategies Named to PSN Top Guns List of Best Performing Strategies for Q4 2022

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

Boston, MA—February 23, 2023— For the third consecutive quarter, Zevin Asset Management's Global Equity strategy has been named to the *PSN Top Guns List* of best performing separate accounts, managed accounts, and managed ETF strategies. Zevin Asset Management's Global Appreciation with Income strategy has also been named to the same list for the first time. In addition to Q4 2022, the firm received the same recognition for its Global Equity strategy in Q3 2022 and Q2 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. "Zevin Asset Management has done remarkable work and we are pleased to include them as a top performer."

"We are delighted by this recognition of the benefits of our socially responsible investment strategy," said Sonia Kowal, president of Zevin Asset Management. "It shows that our multidisciplinary approach of combining rigorous top-down analysis of business cycle outlooks with experienced fundamental stock selection that integrates environmental, social, and governance (ESG) analysis is valuable to the marketplace."

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.

Zevin Asset Management's Global Equity and Global Appreciation with Income strategies achieved Top Gun 5 and 6 ratings, meaning the strategies:

- Delivered returns exceeding those of the style benchmark for the three latest three-year rolling periods, while maintaining an r-squared of at least 0.80 relative to the style benchmark for the recent five-year period. The strategies also had a standard deviation for the five-year period equal to or less than the median standard deviation for the peer group. The products satisfying these criteria and ranking in the top ten for returns over the latest three-year period then become the 5 Star Top Guns, which Zevin Asset Management's Global Equity and Global Appreciation with Income strategies were honored with.



- In addition to satisfying the criteria described above, the products that also rank in the top ten with their information ratios for the latest five-year period then become the 6 Star Top Guns. Again, Zevin Asset Management's Global Equity and Global Appreciation with Income strategies achieved this distinction.

Zevin Asset Management's Global Equity strategy is an actively managed, large-cap equity, long-only product. The strategy seeks long-term capital appreciation by investing predominantly in the equities of companies that have demonstrated consistent revenue and earnings growth, show high returns on equity and invested capital, and are trading at attractive valuations relative to their long-term growth prospects. Zevin Asset Management's Global Appreciation with Income strategy is an actively managed balanced product whose goal is safety with modest capital appreciation. This strategy seeks to provide better results than a traditional global balanced benchmark over the course of a market cycle.

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 Zevin Asset Management

Since its founding in 1997, Zevin Asset Management has been known as an investment manager with an expertise in socially responsible investing. Our guiding philosophy is that less risk can lead to better returns over time, and we can back up that belief with a 25-year track record that has been tested over a variety of market conditions. Since our inception, social responsibility has been at the forefront of our work. We integrate environmental, social, and governance (ESG) analysis into our investment process as an indicator of risk and opportunity, and we engage directly with companies on clients' behalf to achieve meaningful improvements in companies' behaviors. We are also a [Certified B Corporation](#) and a 100% employee-owned, majority women-owned 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.

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