



## LM Capital Group Awarded Top Guns Designation by Informa Financial Intelligence

**San Diego, CA November 18, 2020** LM Capital Group has been awarded a PSN Top Guns distinction by Informa Financial Intelligence's PSN manager database, North America's longest running database of investment managers.

LM Capital Group was honored with a 6-star Top Gun rating for its Core Plus Fixed Income Strategy in the PSN Core Plus Universe and a 2-star Top Gun rating in the PSN Intermediate Core Plus Universe.

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Through a combination of Informa Financial Intelligence's proprietary performance screens, [\\*PSN Top Guns](#) (\*free registration to view Top Guns) ranks products in six proprietary categories in over 50 universes. This is a well-respected quarterly ranking and is widely used by institutional asset managers and investors. Informa Financial Intelligence is part of Informa plc, a leading provider of critical decision-making solutions and custom services to financial institutions.

Top Gun firms are awarded a rating ranging from one to six stars, with the number of stars representing continued performance over time.

LM Capital Group's Core Plus strategy was named Top Gun 6-star rating in the PSN Core Plus Universe achieving 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 Core Plus strategy received a Top Gun 2-star rating in the PSN Intermediate Core Plus Universe. Two Star winners had one of the top ten turns for the one-year period in their universe.

"The Core Plus strategy benefited from the firm's focus on higher quality issues", said John Chalker, Managing Director at LM Capital Group. "Our overweight exposure to investment grade corporates, better quality high yield and emerging market debt following the COVID-19 related selloff positioned the portfolio for large gains in the third quarter."

“Congratulations to LM Capital Group 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.”

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

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)

### **About LM Capital Group**

LM Capital Group, LLC is a minority owned, boutique-style fixed income asset manager. The firm currently has 20 employees and one paid internship servicing \$5.0 billion in assets under management with 25 account relationships. There are five portfolio managers, all of whom make up the Investment Strategy Group, responsible for making the key decisions regarding portfolio positioning.

All assets are managed in separately managed accounts and are customized to meet individual client guidelines and objectives. The firm prides itself on making the portfolio managers readily accessible to client inquiries, quick responses to client requests, and customizing reports to fit client formats.

### **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>.