



Angie Vargas
LM Capital Group
avargas@lmcapital.com
(619) 514-1401

LM Capital Group Named to PSN Top Guns List of Best Performing Strategies for Q4 2025

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

LM Capital Group announced it has been named to the celebrated [PSN Top Guns List](#) of best performing separate accounts, managed accounts, and managed ETF strategies for Q4 2025. The highly anticipated list, published by Zephyr, remains one of the most important references for investors and asset managers.

"These managers have successfully steered through transformative events such as the COVID-19 pandemic market crash, the Brexit referendum, the US-China trade war, the global sell-off of 2015-2016, and the AI Driven market this year", says PSN Product Manager Nick Williams. "Their ability to adapt to evolving market conditions, strategically position across asset classes, and capture opportunities underscores the enduring importance of active management in delivering value to investors."

The Core+ 1 QTR Intermediate Core Plus Universe had one of the top ten returns for the quarter in their respective strategy.

"I'm very happy to see our Core Plus strategy continue its run as a top performer in the peer universe and I applaud our research and portfolio management team for achieving another successful award.", said LM Capital Managing Director, Mike Chalker.

About LM Capital Group

LM Capital Group, LLC is a minority owned, boutique-style fixed income asset manager. The firm currently has 20 employees servicing \$6.1 billion in assets under management. 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 portfolio managers readily accessible to client inquiries, quick responses to client requests, and customizing reports to fit client formats.

Through a combination of PSN's proprietary performance screens, [PSN Top Guns](#) awards products in six proprietary categories in over 75 universes based on continued performance over time.

The complete list of PSN Top Guns and an overview of the methodology can be located at <https://informaconnect.com/zephyr/psn-top-guns/>.

[About PSN](#)

For more than 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 over 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.