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Summit Global Investments is Named to PSN's Top Guns List

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

Bountiful, Utah — January 4, 2022— Summit Global Investments (SGI) announced today it has been named to *PSN's Top Guns List* of best performing separate accounts, managed accounts, and managed ETF strategies for Q3 2022. The firm was recognized for its Small Cap Equity Strategy. The highly anticipated list, published by Zephyr, remains one of the most important references for investors and asset managers.



Summit's Small Cap Equity Strategy received a two-star rating, meaning it had one of the top ten returns for the one-year period ended 9/30/2022, in its respective strategy. In these portfolios, SGI seeks to outperform the Russell 2000 Index® over a market cycle. The strategy typically invests in 180-220 common stocks within U.S. Small Capitalization companies.

"We are very proud of this recognition, as it clearly shows we are bringing value to our institutional and private clients," said Dave Harden, founder & CEO of SGI. "This past year, 2022, was a difficult one for investors. Our unwavering focus on managing risk helped weather the uncertainty and volatility in the market."

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.

"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. “Summit Global Investments has done remarkable work and we are pleased to include them as a top performer.”

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 Summit Global Investments

SGL adheres to a disciplined, managed-risk, multi-factor investment process and continue to find attractive investment opportunities. The firm manages multiple investment strategies for clients. Over a full market cycle, their defensive strategies have historically limited downside risks and allowed for participation in market rallies. SGI’s mission is clear – to help investors win. They care about return and deeply care about the risk associated with such returns. Ever mindful of the impact on their clients’ assets, the combination of Risk, Return and Impact is at the center of their “Managed Risk Approach.”™

SGL’s “Managed Risk Approach” has evolved over decades of research and continuous revisions to understand and exploit what reduces risk, avoids pitfalls and elevated idiosyncratic risks, and drives market returns.

About PSN

For nearly four decades, [PSN](#) has been a top resource for investment professionals. 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. Visit [PSN online](#) to learn more.

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