

Inverness Counsel



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Inverness Counsel, LLC Awarded PSN Top Guns Designation by Informa Financial Intelligence

New York, NY—December 2020— Inverness Counsel, LLC has been awarded multiple PSN Top Guns distinction by Informa Financial Intelligence’s PSN manager database, North America’s longest running database of investment managers.

Inverness Institutional was honored with four Top Gun ratings for its Large Cap Core Equity strategy.

“Inverness is pleased to have been recognized by Informa Financial Intelligence for the exceptional results we have delivered to our clients,” said [Richard H. Chesterton](#), Chief Investment Officer of Inverness Counsel. “The Bull and Bear Master recognition, which reflects the strength of our process and people throughout market cycles, is especially rewarding given the volatility we have faced over the last few years. This is an opportunistic environment for active management, supporting our constant effort to build positions in best-in-class companies at attractive valuations in line with our goal to perform well in up markets and protect capital in down markets”

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 fifty 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.

Inverness Counsel’s Large Cap Core Equity strategy was awarded the Top Gun 1-star rating twice, meaning it had one of the top ten returns for the quarter ended September 30, 2020 in both the U.S. Core and Large Core Equity Universes. This strategy was also named Top Gun 3-star rating, defined as one of the top ten returns for the three-year period in the Large Core Equity Universe. The Large Core peer group is comprised of 156 firms and 265 products and the U.S. Core includes 281 firms and 684 products.

In addition, Inverness’ Large Cap Core Equity strategy was named among the Bull & Bear Masters, meaning that the strategy had an r-squared of 0.80 or greater relative to the style benchmark for a three-year period. Moreover, the strategy had an upside market capture over 100 and a downside market capture less than 100 relative to the style benchmark. The top ten ratios of Upside Capture Ratio over Downside Capture Ratio become the PSN Bull & Bear Masters.

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The Inverness Large Cap Core Equity Strategy invests in a diversified group of both large growth and value companies that are believed will create long-term value for investors. Stock selection is built on a bottom-up process that emphasizes expected earnings and cash flow growth over the next few years relative to current valuations. With a focus on not overpaying for this growth, as well as cash flow stability and balance sheet strength, the strategy is designed to lead to better relative performance over an investment cycle, since attractively valued businesses with high-quality characteristics tend to perform better in difficult markets.

“Congratulations to Inverness Counsel, LLC 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

About Inverness Counsel, LLC

Inverness Counsel, LLC (“Inverness”) is an investment adviser registered with the Securities and Exchange Commission. Inverness, a privately-owned company founded in 1967, manages the investments of high net worth individuals and families, and for over 40 years has also managed the investments of a number of institutions, including pension funds, foundations and endowments. †

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>.