NEWS

For Immediate Release

Media Contacts:
Colin Swift, PR Representative
Impact Communications, Inc.
(913) 649-5009
ColinSwift@ImpactCommunications.org

Tania Hollander, Director of Marketing
YCharts
(866) 965-7552
Tania@YCharts.com

YCharts Releases PSN Top Guns List for Q2 2026, Highlighting Best-In-Class Separate Accounts, Managed Accounts and Managed ETF Strategies

Resilience and Strategic Positioning Define Second Quarter Winners

CHICAGO—[August 26th]—YCharts, a leading investment research and client engagement platform trusted by thousands of financial professionals across North America, has released its highly anticipated PSN Top Guns List for Q2 2026. The list is an important reference for plan sponsors, investors and asset managers, showcasing the best performing separate accounts, managed accounts and managed ETF strategies each quarter.

"On behalf of YCharts, I want to extend my congratulations to this quarter's PSN Top Guns winners for their outstanding performance during a particularly challenging period for investment managers," says President and CEO of YCharts, Sean Brown.

"The second quarter tested even seasoned professionals, as markets shifted from early optimism to a more challenging environment that caught many portfolios off guard. What distinguishes these winners is their disciplined approach and ability to navigate uncertainty with conviction. They positioned portfolios with precision and delivered standout results when it counted most."

"As we look ahead, we're more excited than ever about the future of the SMA space. Our PSN Top Guns winners are leading the way in demonstrating what's possible when skill meets the right investment vehicle. We're committed to supporting this growth and helping investors and advisors connect with the exceptional talent that can deliver meaningful outcomes for their clients."

YCharts' PSN SMA database includes over 2,800 firms, 285 universes, and more than 21,000 products,

detailing asset breakdowns, compliance, key personnel and more. PSN's unique feature is its extensive historical database, offering more than 40 years of data, including net and gross-of-fee returns.
Balanced and Growth Allocation strategies gained roughly 6.0% to 8.0% for the quarter, tracking the broader equity-and-bond recovery as investors navigated the transition from geopolitical relief to renewed monetary policy uncertainty.

The following strategies made the PSN Top Guns list for the Small-Mid Growth Universe:

- Merlin Asset Management, Merlin SMID25: 122.0% (1-year), 89.1 points ahead of the Russell 2500 Growth benchmark
- Merlin Asset Management, Merlin SMID50: 114.5% (1-year), 81.6 points ahead of benchmark
- Hood River, Smid: 73.7% (1-year), 40.8 points ahead of benchmark, backed by $1.09 billion in net inflows this quarter alone

The following strategies made the PSN Top Guns list for the High Yield Universe:

- FIAM, HY Opportunistic: 14.9% (1-year), 9.2 points ahead of benchmark
- MacKay Shields, Muni High Yield: 10.3% (1-year), 4.6 points ahead of benchmark
- Concise Capital, Long Only Comp: 10.2% (1-year), 4.5 points ahead of benchmark

The following strategies made the PSN Top Guns list for the High Yield Universe: Emerging Markets Universe:

- BlackRock, Taiwan Eq Growth: 141.7% (1-year), 97.5 points ahead of benchmark
- William Blair, EMxChina Growth: 79.1% (1-year), 34.9 points ahead of benchmark
- Ariel Investments, Ariel EMVxC: 75.6% (1-year), 31.4 points ahead of benchmark

Read the Q2 2026 PSN Top Guns Commentary here. View all Q2 PSN Top Guns winners here.

To enhance PSN contributors' reach even further, YCharts offers a robust Promotional and Market Intelligence package program, the PSN Manager Advantage. The promotional package offers digital coverage and brand publicity, featuring ongoing marketing and a dedicated landing page to educate investors about individual SMAs. The Market Intelligence Package provides actionable market insights from the PSN Database, enhancing exposure and branding. Visit here to learn more.

ABOUT PSN

For more than 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, model delivered SMA strategies and full holdings. Unique to PSN is its robust historical database of over 40 Years of Data Including Net and Gross-of-Fee Returns.

ABOUT YCHARTS

YCharts is a top-ranked investment research and client engagement platform that enables financial advisors and asset managers to make smarter investment decisions and better communicate with clients. Trusted by

over 15,000 financial professionals and recognized as the Investment Research market leader by Kitces research, YCharts delivers intuitive tools for security research, portfolio construction, AI-enabled proposals, client communication, and market monitoring. In the 2026 T3 / Inside Information Technology Survey, YCharts was named a "Software All-Star" across five categories. YCharts also earned a 2025 Wealthie Award for its AI Chat feature and has been recognized ten consecutive times on the Inc. 5000 list of America's fastest-growing private companies. Learn more at www.ycharts.com.

Visit YCharts on social media
LinkedIn Twitter YouTube Instagram