



Top Guns Manager of the Decade Awarded to Tradition Asset Management by Informa Financial Intelligence

February 21, 2020

SUMMIT, NJ – Tradition Asset Management today announced that it 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.

Tradition Asset Management was honored with a Top Guns Manager of the Decade rating for its Dividend Value strategy.

“It’s great for the firm to be recognized as a Top Gun equity investment manager. I am proud of our team,” said Benjamin C. Halliburton, Chief Investment Officer.

Through a combination of Informa Financial Intelligence’s proprietary performance screens, PSN 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.

Tradition Asset Management’s Dividend Value strategy was named Top Guns Manager of the Decade of the All-Cap Value Universe, meaning the Dividend Value strategy had an r-squared of 0.80 or greater relative to the style benchmark for the latest 10-year period. Moreover, products must have returns greater than the style benchmark for the latest 10-year period and also standard deviation less than the style benchmark for the latest ten-year period. At this point, the top ten performers for the latest 10-year period become the PSN Top Guns Manager of the Decade.

Tradition Asset Management’s Dividend Value strategy was named Top Gun 6-Star rating, meaning our Dividend Value strategy had an r-squared of 0.80 or greater relative to the style benchmark for the



recent five-year period. Moreover, products must have returns greater than 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.

“Congratulations to Tradition Asset Management, 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/>

About Tradition Asset Management

Tradition Asset Management, LLC is a wholly owned subsidiary of Luxon Financial LLC. The firm, founded in 2000, provides investment research, asset management and comprehensive wealth management services to individuals, families and institutions. Tradition Asset Management, LLC is a Securities and Exchange Commission Registered Investment Advisor and provides portfolio management and related services for a fee.

About Informa Financial Intelligence’s Zephyr

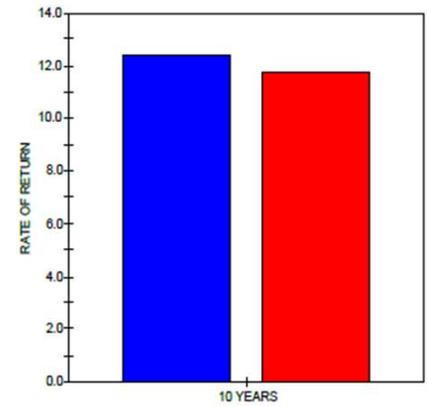
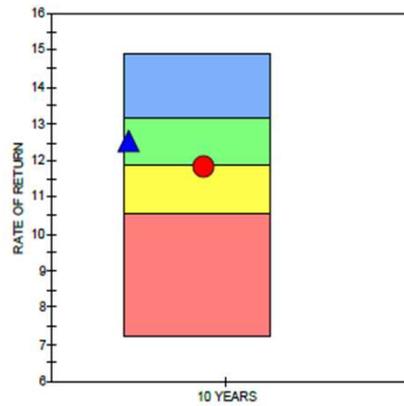
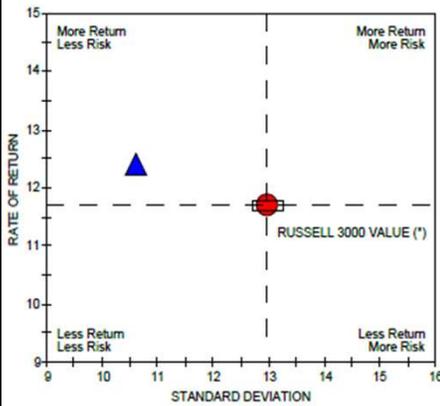
Financial Intelligence, part of the Informa Intelligence Division of Informa plc, is a leading provider of products and services helping financial institutions around the world cut through the noise and take decisive action. Informa Financial Intelligence’s solutions provide unparalleled insight into 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>.



TOP GUNS MANAGER OF THE DECADE

TRADITION ASSET MANAGEMENT DIVIDEND VALUE

PSN ALL CAP VALUE UNIVERSE



■ TRADITION ASSET DIV VALUE

● RUSSELL 3000 VALUE (*)

Criteria: The PSN universes were created using the information collected through the PSN investment manager questionnaire and use only gross of fee returns. Mutual fund and commingled fund products are not included in the universe. PSN Top Guns investment managers must claim that they are GIPS compliant. Products must have an r-squared of 0.80 or greater relative to the style benchmark for the ten-year period ending DECEMBER 31, 2019. Moreover, products must have returns greater than the style benchmark for the ten-year period ending DECEMBER 31, 2019 and also standard deviation less than the style benchmark for the ten-year period ending DECEMBER 31, 2019. At this point, the top ten performers for the latest ten-year period ending DECEMBER 31, 2019 become the PSN Top Guns Manager of the Decade.

The content of PSN Top Guns is intended for use by qualified investment professionals. Please consult with an investment professional before making any investment decisions using content or implied content from PSN Top Guns.

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(*) Style Benchmark

The PSN All Cap Value universe is comprised of 94 firms and 123 products