



Media Contact: Jeff Cianci

CAIM, LLC

jeff@caimllc.com

(212) 920-8382

Catherine Avery Investment Management [CAIM] Named to PSN Top Guns List of Best Performing Strategies for Q1 2026

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

Sarasota, FL—June 2, 2026— CAIM announced today it has been named to the celebrated [PSN Top Guns List](#) of best performing separate accounts, managed accounts, and managed ETF strategies for Q1 2026. The highly anticipated list, published by Zephyr, remains one of the most important references for investors and asset managers.

"Q1 2026 presented a dynamic market environment characterized by early uncertainty that intensified with geopolitical developments in late February, including military action in Iran, creating both challenges and opportunities for skilled active managers," says PSN Product Manager Nick Williams. "PSN Top Guns managers excelled by navigating the quarter's evolving landscape—from initial market hesitancy through the geopolitical shock and its ripple effects on energy markets—while positioning strategically amid persistent inflation concerns and shifting Fed expectations. Their ability to adapt quickly across asset classes while maintaining discipline throughout this volatile period demonstrates the distinct value of active management in SMAs. As markets transitioned from uncertainty to managing geopolitical risks and sticky inflation, these managers proved their worth by preserving capital during turbulent periods and strategically identifying opportunities as conditions evolved, delivering value when it mattered most."

CAIM offers Separately Managed Accounts focusing on both higher dividend yields and dividend increases, in what we believe is a unique combination of the two focus areas. Our proprietary screens focus on fundamentals with high free cash flows and strong relative growth. Our focus on risk control has helped us achieve this Manager of the Decade award. The CAIM Dividend Focus is available via SMARtX Advisory, Envestnet, Adhesion Wealth (AssetMark), Orion, Schwab Marketplace, and Goldman Sachs.

"We are honored to be selected by Zephyr for this prestigious designation, and it reflects our research efforts in creating alpha with a lower risk and sustainable approach", said Catherine Avery, CEO and Portfolio Manager of the firm.

CAIM's Dividend Focus strategy earned several PSN Top Guns awards as of Q1 2026. Our Dividend Focus received awards in the following categories:

- 5-Star Category: both the Large Value Universe and the US Value Universe had an r-squared of 0.80 or greater relative to the style benchmark for the recent five-year period. Moreover, the strategy's returns exceeded 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 returns for the latest three-year period then become the 5 Star Top Guns.
- 4-Star Category: Large Value Universe had an r-squared of 0.80 or greater relative to the style benchmark for the recent five-year period. Moreover, the strategy's returns exceeded the style benchmark for the three latest three-year rolling periods. The top ten returns for the latest three-year period then become the 4 Star Top Guns.
- 1-Year Category: Large Value Universe had one of the top ten returns for the one-year period in their respective strategy.

CAIM has outperformed its benchmark, the Russell 1000 Value index over the 1, 3, 5, 7 and 10 year periods with top quartile performance versus its peers. We believe our outperformance is a result of effectively combining dividend growth with dividend yields above our benchmark and significantly above the SP 500. It is a testament to our disciplined screening process combined with our in-depth fundamental research. For clients, we provide extensive research and communications, including a widely read Quarterly Commentary, as well as periodic research-oriented industry sector discussions.

Our model portfolio is biased toward higher free cash flow and dividend yields, as well as lower relative valuations. Our average 3.0% dividend yield on the portfolio combines with an average P/E multiple as much as 25% lower than that of the overall market. Both of these measures offer risk control and reduced volatility.

The complete list of PSN Top Guns and an overview of the methodology can be located at https://psn.fi.informais.com/PSNTopGuns/topguns_zephyr.asp Registration is required.

About CAIM

CAIM is an independent, 100% woman owned investment management firm specializing in a low volatility equity strategy that focuses on high quality dividend paying stocks.

www.caimllc.com

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, 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**. Zephyr's PSN produces the PSN Outlook eBook series provides insight and trends about the SMA industry. You can view them [online here](#).

Visit [PSN online](#) to learn more.