



Crossmark Global Investments Awarded Top Guns Designation by Informa Financial Intelligence

Houston, Texas—April 22, 2021— Crossmark Global Investments is pleased to announce that the Crossmark Large Cap Core Growth Strategy, Balanced Core Strategy, and Income Opportunities Strategy have each been awarded a PSN Top Guns distinction by the Informa Financial Intelligence PSN manager database, North America's longest running database of investment managers. Crossmark was awarded a 6-star Top Gun rating for its Large Cap Growth Strategy, a 3-star Top Gun rating for its Balanced Core Strategy, and a 1-star Top Gun rating for its Income Opportunities Strategy.

"We are honored to be recognized by Informa Financial Intelligence for our investment solutions," said Melville Cody, Senior Portfolio Manager. "We strive to create best-in-class, risk-controlled products for our clients and earning three PSN Top Guns distinctions speaks to our dedication to that goal."

Through a combination of the Informa Financial Intelligence 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.

Crossmark's Large Cap Core Growth Strategy was awarded a Top Gun 6-star rating, meaning our Large Cap Growth Strategy 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 information ratios for the latest five-year period then become the 6-Star Top Guns. Additionally, our Balanced Core Strategy was awarded the Top Gun 3-star rating and our Investment Opportunities Strategy was awarded the Top Gun 1-star rating, meaning these strategies had one of the top ten returns for the three-year and one-year periods in their respective universes.

"Congratulations to Crossmark Global Investments 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 the 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

The name of the award is in **bold** for the PSN peer group universe listed.
The awards are for the 4Q2020, with the period ending 12/31/2020.

LgCapCore Growth 6 Stars MA Large Cap Equity Universe – 77 Firms and 154 Products

LgCapCore Growth 6 Stars MA US Equity Universe – 109 Firms and 320 Products

Income Opp 1 Stars Intermediate Core Fixed Income Universe – 126 Firms and 185 Products

Balanced Core 2 Stars MA US Balanced Universe – 24 Firms and 44 Products

Balanced Core 3 Stars MA US Balanced Universe – 24 Firms and 44 Products

1 STAR CATEGORY: The peer groups were created using the information collected through the PSN investment manager questionnaire and uses only gross of fee returns. PSN Top Guns investment managers must claim that they are GIPs compliant. These top performers are strictly based on current quarter returns.

2 STAR CATEGORY: The peer groups were created using the information collected through the PSN investment manager questionnaire and uses only gross of fee returns. PSN Top Guns investment managers must claim that they are GIPs compliant. These top performers are strictly based on returns for the one year period.

3 STAR CATEGORY: The peer groups were created using the information collected through the PSN investment manager questionnaire and uses only gross of fee returns. PSN Top Guns investment managers must claim that they are GIPs compliant. These top performers are strictly based on returns for the three year period.

4 STAR CATEGORY: The peer groups were created using the information collected through the PSN investment manager questionnaire and uses only gross of fee returns. 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 recent five year period. Moreover, products must have returns greater than the style benchmark for the three latest three-year rolling periods. The top ten returns for the latest three-year period then become the TOP GUNS.

5 STAR CATEGORY: The peer groups were created using the information collected through the PSN investment manager questionnaire and uses only gross of fee returns. 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 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 returns for the latest three-year period then become the TOP GUNS.

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About Crossmark Global Investments, Inc.

Crossmark Global Investments provides a full suite of investment management solutions to institutional investors, financial advisors and the clients they serve. Crossmark has a multidecade legacy of specializing in faith-based and values-based investing strategies for clients. Founded in 1987, the firm is headquartered in Houston, Texas.



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>.

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