



## **Crossmark Global Investments Awarded Top Guns Designation by Informa Financial Intelligence**

**Houston, Texas—December XX, 2021—** Crossmark Global Investments is pleased to announce that several of the firm’s Separately Managed Account (SMA) strategies have been awarded a PSN Top Guns distinction by Informa Financial Intelligence’s 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 Core Unscreened SMA strategy, 3-Star Top Gun rating for its Balanced Core SMA strategy, and a 2-Star Top Gun Rating for the Income Opportunities SMA strategy.

“We are honored to have three of our strategies awarded with Top Gun ratings this year,” said Bob Doll, Chief Investment Officer at Crossmark Global Investments. “This award distinguishes our strategies from those in their peer groups reporting to PSN, furthering the notion that we can provide investors with top-tier strategies that align with their values.”

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.

Crossmark’s Large Cap Core Unscreened Strategy received a 6-star rating, which means the 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. The Balanced Core Strategy received a 3-Star Top Gun rating, which means the strategy had one of the top ten returns for the three-year period in their respective universes. Also, the Income Opportunities Strategy was awarded the Top Gun 2-star rating, meaning the strategy had one of the top ten returns for the one-year period in their respective universes.

“Congratulations to Crossmark 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 Tobiassen at [Margaret.tobiassen@informa.com](mailto:Margaret.tobiassen@informa.com)

The name of the award is in **bold** for the PSN peer group universe listed.

Balanced Core - MA US Balanced Universe - **1 star**

Balanced Core - MA US Balanced Universe - **3 star**

Income Opportunities - Intermediate Core Fixed Income Universe - **2 star**

Large Cap Core Unscreened - MA Large Cap Equity Universe - **6 star**

Large Cap Core Unscreened - MA US Equity Universe - **6 star**

**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.

**6 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 information ratios for the latest five-year period then become the TOP GUNS.

### **About Crossmark Global Investments, Inc.**

Crossmark Global Investments is a faith-based investment management firm that provides a full suite of investment strategies to institutional investors, financial advisors, and the clients they serve. For over 30 years, the firm has delivered uniquely constructed products based on its proprietary, disciplined, and repeatable process. Crossmark is especially known for helping its clients align their investments with their values by creating socially conscious, responsible investment strategies. Founded in 1987, the firm is headquartered in Houston, Texas. For more information visit: <https://www.crossmarkglobal.com>.

**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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