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M Capital Advisors Awarded Manager of the Decade
Quarterly PSN Top Guns List published by Zephyr identifies best-in-class separate accounts, managed accounts, and managed ETF strategies

March 20, 2023 — M Capital Advisors 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 4Q 2022. The highly anticipated list, published by Zephyr, remains one of the most important references for investors and asset managers.

“With the growing interest in separately managed accounts, the PSN Top Guns List has attracted greater attention,” says Margaret Tobiasen, SVP of Data Distribution who cites PSN’s pioneering efforts as the first SMA database as the reason for the list’s popularity. “M Capital Advisors has done remarkable work and we are pleased to include them as a top performer.”

The portfolio is constructed with a blend of large-cap value and growth stocks. The strategy combines long-term capital appreciation with income by investing in high quality, dividend-yielding securities. Our objective is to grow income, preserve capital and produce competitive returns.

“We are honored to receive this ranking. Our investment team worked hard for this well-deserved recognition, and it solidifies our commitment to serving our clients,” said Frank Mastrapasqua, PhD, Chairman of M Capital Advisors.

Through a combination of PSN’s proprietary performance screens, PSN Top Guns ranks products in six proprietary categories in over 75 universes based on continued performance over time.

“The *PSN Top Guns List* award is certainly gratifying and a testament to M Capital’s disciplined investment process which tightly integrates a top-down macroeconomic view with bottom-up fundamental equity analysis” remarked Patrick Snell, CFA, Chief Investment Officer.

M Capital’s Large-Cap Core Equity strategy was named Manager of the Decade, meaning the Large-Cap Core Equity strategy had an r-squared of 0.80 or greater relative to the style benchmark for the latest 10-year period. Moreover, the strategy’s returns were 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.



The complete list of PSN Top Guns and an overview of the methodology can be located on <https://psn.fi.informais.com/>

About M Capital Advisors

M Capital Advisors is a research-based investment manager offering multiple equity and fixed income strategies to serve its individual and institutional clients. Founded in 1993 by Frank Mastrapasqua, Ph.D., the firm has offices located in Nashville and San Antonio.

About PSN

For nearly 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 and full holdings. Unique to PSN is its robust historical database of nearly 40 Years of Data Including Net and Gross-of-Fee Returns. Visit <https://financialintelligence.informa.com> to learn more.

PSN and its affiliated entities provide a data collection service and performance measurement tools for investment management firms including M Capital Advisors. M Capital Advisors pays an annual subscriber fee to PSN and provides its information to PSN periodically. PSN and its clients then have the ability to run reports and purchase reports across the PSN database. Because PSN ran this report for a particular client focusing on M Capital Advisors, this is deemed an endorsement of M Capital Advisors by PSN. M Capital Advisors has not and will not pay PSN directly or indirectly for this endorsement. M Capital Advisors does not guarantee the accuracy or completeness of the information provided by PSN. Performance results may be provided with additional disclosures available from M Capital Advisors.

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