

Cornerstone Investment Partners Awarded *Top Guns* Designation by Informa Financial Intelligence in Q4 2023



ATLANTA, GA – February 21, 2024 - [Cornerstone Investment Partners](#), has been awarded multiple PSN Top Guns distinctions by Informa Financial Intelligence’s PSN manager database, North America’s longest running database of investment managers, in Q4 2023.

Concentrated 30

PSN “TOP GUNS” RATING

Returns exceeded the style benchmark for the three latest three-year rolling periods and had an r-squared of 0.80 or greater relative to the style benchmark for the recent five-year period
Standard deviation for the latest five-year period equal or less than its peer group
Top 10 information ratio for the latest five-year period

Opportunistic SMID Cap Value

PSN “TOP GUNS” RATING

Top Ten Returns for the Three-Year Period

Returns exceeded the style benchmark for the three latest three-year rolling periods and had an r-squared of 0.80 or greater relative to the style benchmark for the recent five-year period
Designated as a “Bull & Bear Masters” strategy, having top ten ratios of Upside Capture Ratio over Downside Capture Ratio

Value 50

PSN “TOP GUNS” RATING

Returns exceeded the style benchmark for the three latest three-year rolling periods and had an r-squared of 0.80 or greater relative to the style benchmark for the recent five-year period
Standard deviation for the latest five-year period equal or less than its peer group
Top 10 information ratio for the latest five-year period

Diversified Small Cap Core

PSN “TOP GUNS” RATING

Top Ten Returns for the Quarter

Top Ten Returns for the Three-Year Period

Returns exceeded the style benchmark for the three latest three-year rolling periods and had an r-squared of 0.80 or greater relative to the style benchmark for the recent five-year period
Designated as a “Bull & Bear Masters” strategy, having top ten ratios of Upside Capture Ratio over Downside Capture Ratio

Cornerstone Strategies

[Concentrated 30](#) has received “Top Gun” recognition for the twenty-third time. Concentrated 30 is a U.S., large cap, relative value equity portfolio consisting of Cornerstone’s 30 most compelling ideas utilizing Cornerstone’s proprietary valuation model, the Fair Value Model, as well as a seven person investment team conducting deep fundamental research designed to beat the broader market.

[Opportunistic SMID Cap Value](#) has received “Top Gun” recognition for the seventy-ninth time. Opportunistic SMID Cap Value is a U.S., smid cap, concentrated value equity portfolios screening the investable universe with multiple tools (CFROI, Cornerstone’s proprietary Fair Value Model) to identify attractive candidates for deep fundamental research designed to outperform the Russell 2500 Value.

[Value 50](#) has received “Top Gun” recognition for the sixth time. Value 50 is a U.S., large cap, value equity portfolio combining a focus on the “sweet spot” of Cornerstone’s proprietary valuation model with a strategy leadership team conducting deep fundamental research on attractively valued companies designed to outperform the Russell 1000 Value.

[Diversified Small Cap Core](#) has received “Top Gun” recognition for the thirty-seventh time. Highly disciplined U.S., small cap portfolio consisting of 240 well diversified names that focuses on those companies with improving revenues and earnings as well as strong balance sheets and cash flows designed to outperform the Russell 2000 portfolio.

[Compass](#) is a three-time “Top Gun” recognized strategy. Compass is a U.S., tactical asset allocation strategy in which Cornerstone’s strategy leadership team utilizes the Concentrated 30 for equity exposure and bond ETFs for fixed income exposure, and the Fair Value Model to determine the appropriate asset allocation weighting based on the level of attractiveness of each asset class. Designed to outperform a static 60% stock/40% bond balanced account.

[Opportunistic Small Cap Value](#) is a “Top Gun” recognized U.S., small cap, concentrated value equity portfolios screening the investable universe with multiple tools (CFROI, Cornerstone’s proprietary Fair Value Model) to identify attractive candidates for deep fundamental research designed to outperform the Russell 2000 Value.

Through a combination of Informa Financial Intelligence’s proprietary performance screens, [*PSN Top Guns](#) (*free registration to view 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. 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

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>.

Cornerstone does not pay a fee to be included in PSN’s rankings. Past performance does not indicate future results. As with all investments, the possibility for profit is accompanied by the risk of loss.

There is no substitute for experience. The Cornerstone Investment Partners portfolio management team shares over 100 years of investment analysis and portfolio management experience. For nearly 30 of those years, the members of the portfolio management team have worked together adhering to the same investment philosophy, exercising the same approach to security selection, and employing the same discipline as it pertains to portfolio design. Despite the numerous times we have heard “It’s different this time,” experience has taught us it rarely is different. Regardless of the environment, Cornerstone portfolio managers have maintained their focus on buying high quality companies at attractive prices while exercising the patience necessary to unlock the value.