



## Laurus US Small Cap Equity Named to PSN Top Guns List of Best Performing Strategies for Q1 2022

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

**Toronto, Canada - May 15, 2022**— Laurus Investment Counsel announced today their US Small Cap equity strategy has once again been named to the celebrated *PSN Top Guns List* of best performing separate accounts, managed accounts, and managed ETF strategies for Q1 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. *“Laurus has done remarkable work and we are pleased to include them as a top performer.”*

Laurus’ US Small-Cap strategy invests in high-quality, growth-oriented companies that have strong, predictable cashflow generation, sustainable high returns on capital, and attractive growth opportunities. A careful assessment of management is also used to discern the quality company, with the team focusing on management’s leadership and capability, behavioral patterns, and transparency with shareholders. In addition, a detailed valuation methodology is utilized which relies most heavily on discounted free cash flow models. The result of the investment process is a high conviction portfolio comprised of 30-40 companies that exhibit the best combination of financial growth, cash flow visibility and upside opportunity.

*“This award reflects our team’s continued commitment to our mission to provide clients a lower risk path to accessing the potentially superior returns in small and mid-cap investing. We are extremely pleased to be recognized as a Top Gun Investment Manager by Informa Financial Intelligence,”* said Christopher Page, President & CEO.

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

**The Laurus US Small Cap strategy achieved both 5-Star and 6-Star awards in the Small Cap Core Universe.** Top Gun firms are awarded a rating ranging from one to six stars, with the number of stars representing continued performance over time. An explanation of the Laurus awards is defined by Informa is as follows:

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. To achieve the 5-Star award, the strategy ranked in the top ten returns for the latest three-year period. To achieve the 6-Star award, the strategy ranked in the top ten information ratios in the latest five-year period. The peer groups were created using the



information collected through the PSN investment manager questionnaire and use only gross of fee returns. PSN Top Guns investment managers must claim that they are GIPs compliant.

The content of PSN Top Guns Is Intended for use by qualified Investment professionals. Please consult with an investment professional before making any investment decisions using content or implied content from PSN Top Guns. Note that past performance is not indicative of future results.

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

### **About Laurus Investment Counsel**

Founded in 2014 and based in Toronto, Canada, Laurus is an employee-owned fundamental investor, searching globally to invest in strong, entrepreneurial small and mid-cap businesses with sustainable competitive advantages. Using an approach similar to private equity, Laurus conducts deep fundamental research, constructively engages with management and adopts an uncommonly long-term investment horizon to each investment. This process has proven to deliver quality returns with lower volatility over multiple market cycles for our institutional clients. Laurus's offerings include Canadian, US, International and Global Small Cap as well as North American Equity and Canadian Equity strategies. For more information about Laurus, visit [www.lauruscounsel.com](http://www.lauruscounsel.com)

### **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 rely. 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. 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](mailto:Margaret.tobiasen@informa.com). Visit PSN online to learn more.

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### **Media Contacts**

In the United States:

Donna DiMaria  
Tessera Capital  
[donna.dimaria@tesseractcapital.com](mailto:donna.dimaria@tesseractcapital.com)  
(585) 364-3065

In Canada:

Chris Page, President & CEO  
Laurus Investment Counsel  
[chris.page@lauruscounsel.com](mailto:chris.page@lauruscounsel.com)  
(647) 479-2061