



2 Corporate Drive, Suite 770  
Shelton, Connecticut 06484-6238 USA

## **Wright Investors' Service, Inc. Awarded Top Guns Designation by Informa Financial Intelligence**

**Shelton, Connecticut, May 20, 2021** – Wright Investors' Service, Inc. announced today that the Wright Ultra-Short Duration Fixed Income strategy has been awarded a Top Guns designation by Informa Financial Intelligence's PSN manager database, North America's longest running database of investment managers.

Wright Investors' Service, Inc. was honored with a 1-Star Top Gun rating for its Wright Ultra-Short Duration Fixed Income for the period ending March 31, 2021.

"Our disciplined process for identifying outstanding companies and attractive corporate bond valuations, while managing duration, has delivered consistently strong performance to our Ultra-Short Duration Fixed Income Strategy" – **M. Anthony E. van Daalen, CFA, President & Chief Investment Officer of Global Fixed Income.**

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.

Top Gun firms are awarded a rating ranging from one to six stars, with the number of stars representing continued performance over time.

Wright Ultra-Short Duration Fixed Income strategy was named a Top Gun with a 1-Star rating in the Less Than 1 Year Maturity Universe.

**1-Star Category:** Products with this rating were top ten performers within their respective universes, based on quarterly returns.

Wright's Ultra-Short Duration Fixed Income strategy aims to outperform the performance of the Bloomberg Barclays Short-term Government/Corporate Index on a risk-adjusted basis by investing in high quality corporate bonds with a focus on valuations and investment timing.

"Congratulations to Wright Investors' Service, Inc. 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 <http://www.informais.com/resources/psn-top-guns>.

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).

#### **About Wright Investors' Service, Inc.**

Wright Investors' Service, Inc., a wholly owned subsidiary of The Winthrop Corporation, is an independent investment management and advisory organization that provides investment services to institutional and individual investors. The management of assets is primarily implemented through the disciplined application of a series of quantitative and qualitative methods intended to achieve the investment objectives of each client.

#### **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>.

#### **PAST PERFORMANCE IS NOT INDICATIVE OF FUTURE RESULTS**

This announcement letter is intended for limited circulation and is provided to the recipient on a confidential basis and the recipient expressly acknowledges and agrees that they will hold this information, this document, and all related documents and disclosures in the strictest confidence. This document is not intended for public use or distribution, and dissemination, publication, distribution, disclosure, copying or use of the information, documents, or disclosures contained herein is expressly prohibited.

This announcement does not constitute an offer to sell any securities or the solicitation of an offer to purchase any securities nor does it constitute tax advice.

**Statements and opinions in this publication are based on sources of information believed to be accurate and reliable, but the Advisor makes no representations or guarantees as to the accuracy or completeness thereof. Forward-looking statements are not a promise or guaranty of future events.**

Wright Investors' Service, Inc. ("Wright") makes payment to Informa Intelligence, Inc. ("III") with respect to research services, however, such payment is not made to participate in the award selection process, nor to receive any award. Wright may also make payment to III to receive access to III ranking reports to acquire reproduction and distribution rights with respect to the award information, however, the purchase of III ranking reports is not required to be considered for, or to receive, III awards. Informa Intelligence, Inc. is part of Informa PLC.



ACHIEVES

# PSN Top Guns Ratings

for period ending March 31, 2021



## Wright Investors' Service, Inc.

Wright Investors' Service, Inc., is an internationally recognized investment management and financial advisory firm. Headquartered in Shelton, CT, Wright's assets under management are \$1.3 billion as of March 31, 2021.

## Information about PSN

In 1984, Informa Investment Solutions, Inc. introduced the first commercially available investment manager search and evaluation database—Plan Sponsor Network, or PSN. PSN offers financial professionals high-quality, in-depth data on U.S., non-U.S. and global investment managers. There are over 2,000 investment managers participating in the PSN database, which covers more than 20,000 domestic and international investment products.

Investment consultants, plan sponsors and brokerage firms use PSN to perform manager searches and ongoing evaluation. Money managers use PSN for competitive analysis and positioning. Participation in the PSN database is the mandatory starting point for many client manager search processes.

## Wright Investors' Service, Inc.

### Top Guns Ratings for Period Ending March 31, 2021

Wright Investors' Service, Inc. earned a Top Guns rating from PSN for the period ended March 31, 2021. Wright's Ultra-Short Duration Fixed Income strategy ranked among the highest performers in PSN's March 31, 2021 Top Guns ratings - receiving a 1-Star rating. Utilizing a combination of its clients' top priority performance screens, PSN Top Guns ranks products in six proprietary star categories in over 50 universes. This quarterly ranking is used by institutional asset managers and investors.

The 1-Star category is evaluated as follows: The PSN universes were created using the information collected through the PSN investment manager questionnaire and use only gross of fee returns. Mutual fund and commingled fund products are not included in the universe. PSN Top Guns investment managers must claim that they are GIPS compliant. PSN Top Guns ranks products in six proprietary star categories in over 50 universes. The 1-Star category products with this rating were top ten performers within their respective universes, based on quarterly returns.

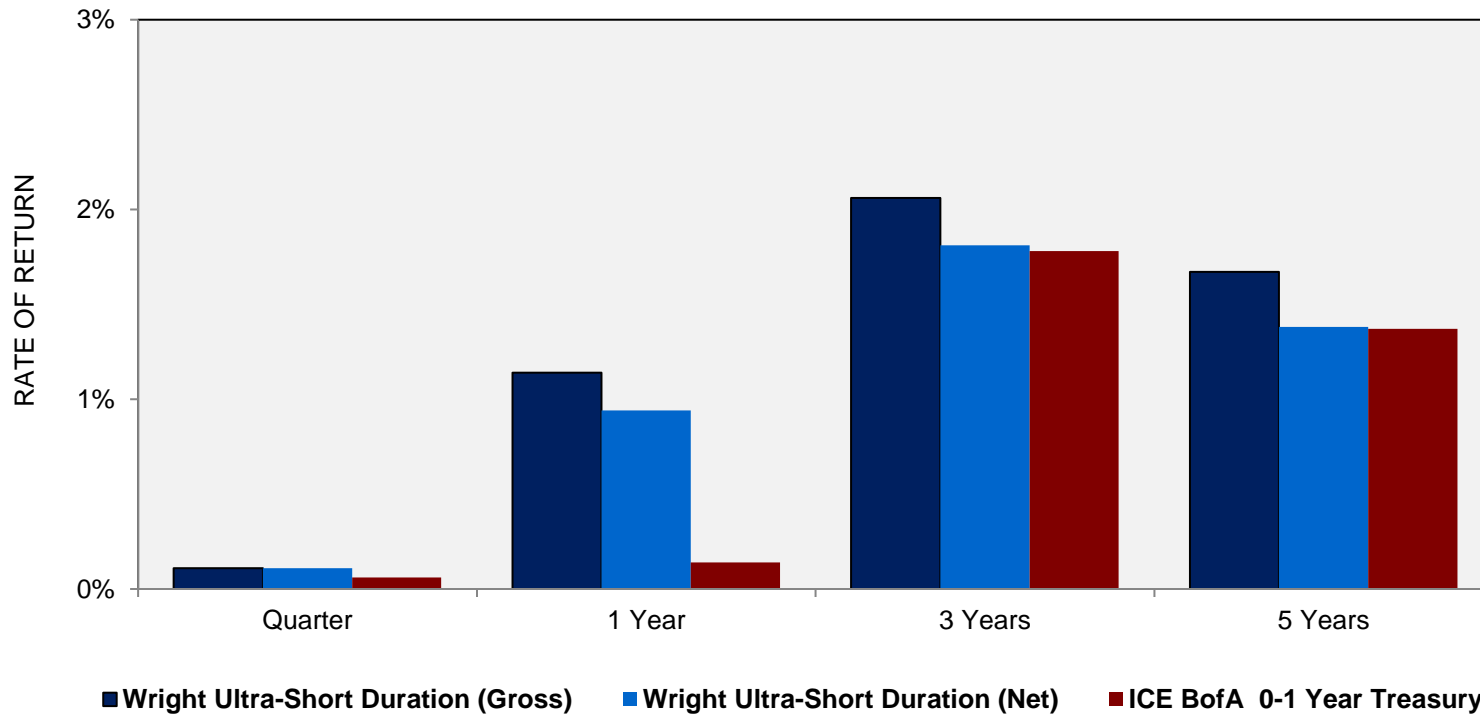
Wright Investors' Service, Inc. ("Wright") makes payment to Informa Intelligence, Inc. ("III") with respect to research services, however, such payment is not made to participate in the award selection process, nor to receive any award. Wright may also make payment to III to receive access to III ranking reports to acquire reproduction and distribution rights with respect to the award information, however, the purchase of III ranking reports is not required to be considered for, or to receive, III awards. Informa Intelligence, Inc. is part of Informa PLC.

Source: Informa Financial Intelligence website, <https://psn.fi.informais.com>

<sup>1</sup> The PSN Less Than 1 Year Maturity Universe is comprised of 42 firms and 61 products.

# WRIGHT INVESTORS' SERVICE, INC. ULTRA-SHORT DURATION FIXED INCOME

**PERIODS ENDING MARCH 31, 2021**



	Quarter	1 Year	3 Years	5 Years
<b>Gross</b>	<b>0.11%</b>	<b>1.14%</b>	<b>2.06%</b>	<b>1.67%</b>
<b>Net</b>	<b>0.11%</b>	<b>0.94%</b>	<b>1.81%</b>	<b>1.38%</b>
<b>Benchmark</b>	<b>0.06%</b>	<b>0.14%</b>	<b>1.78%</b>	<b>1.37%</b>

The performance results have been presented on a Gross and Net basis. Periods over 1 year are annualized. Performance results presented on a Gross basis do not reflect the payment of investment advisory fees and other expenses that may be incurred by an investment account. Performance results presented on a Net basis are net of advisory fees paid to Wright. However, actual net returns would be reduced by fees and other expenses that may be incurred by an investment account, including the fees that a Bank trust department and/or custodian may charge an account. The data has not been audited or otherwise verified by any outside party and should not be construed as representative of the returns that may be experienced by investors.

*(\*) Style Benchmark - Investors cannot directly invest in an index (benchmark) and unmanaged index returns do not reflect any fees, expenses or sales charges. While Wright believes that the ICE BofA 0-1 Year Treasury Index is relevant to evaluating Wright Ultra-Short Duration Fixed Income, it is for illustration and discussion purposes only and should not be relied upon.*

**PAST PERFORMANCE IS NOT INDICATIVE OF FUTURE RESULTS**