

BROADRIDGE TOP 40 Money Managers - 4 Quarters Returns

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Product/Style Category: **U.S. Fixed Income (All Styles)**
 Performance Measurement Period: **4 Quarters Ending 12/31/2024**
 Mean Return for the Category and Period: **3.8312%**
 Universe Size: **1132**



Lists the top rates of return reported by managers for this category and time period. All results are reported net of fees and inclusive of cash.

Rank	Firm Name/Portfolio	4 Quarters ROR	Assets in Composite
1	Ulland Investment Advisors, LLC - Intelligent Fixed Income	19.19%	\$197.6M
2	Pioneer Investments - Pioneer ILS Interval Fund	18.91%	\$661.5M
3	Leader Capital Corporation - Leader Capital Short Term High Yield Bond Fund;Ins	16.96%	\$88.9M
4	Pioneer Investments - Pioneer CAT Bond Fund;K	15.78%	\$57.9M
5	Liberty Street Advisors, Inc - Robinson Opportunistic Income Fd;Inst	15.62%	\$10.1M
6	Voya Investment Management - Voya Mortgage Investment Fund	14.93%	\$1656.1M
7	Ulland Investment Advisors, LLC - Intelligent Fixed Income IG	14.46%	\$11.1M
8	Camden Asset Management, L.P. - Camden Absolute Return Income	13.27%	\$39.0M
9	Nuveen, a TIAA Company - Nuveen Enhanced High Yield Municipal Bond Fund;I	12.64%	\$232.1M
10	Cohen & Steers Capital Management, Inc. - Cohen & Steers Preferred Securities and In SMA Shs	12.50%	\$421.7M
11	Fidelity Institutional Asset Management - High Yield CMBS	12.34%	\$2859.5M
12	First Eagle Investment Management, LLC - First Eagle High Yield Municipal Fund;I	11.97%	\$3601.8M
13	Flaherty & Crumrine, Inc. - Preferred Securities	11.79%	\$3260.8M
14	Eaton Vance Management - Eaton Vance Floating-Rate Opportunities Fund;I	11.76%	\$57.5M
15	Nuveen, a TIAA Company - Nuveen Preferred Securities & Income Mgd Accts Ptf	11.53%	\$17.7M
16	SEI Investments (United States) - SEI Alternative Income Fund;F	11.22%	\$21.7M
17	Flaherty & Crumrine, Inc. - Tax-Advantaged Preferred Securities	11.15%	\$635.4M
18	J.P. Morgan Asset Management - JPMorgan Preferred and Income Securities Fund;I	11.08%	\$512.7M
19	First Trust Advisors, LP - First Trust Preferred Securities and Income;I	10.99%	\$147.2M
20	Voya Investment Management - AllianzGI US Short Duration High Income	10.96%	\$383.5M
21	SSI Investment Management LLC - SSI Outright Investment Grade Convertible	10.95%	\$24.9M
22	Macquarie Asset Management - US Convertible Bond	10.82%	\$105.2M
23	Invesco - Invesco Dynamic Credit Opportunity Fund;R6	10.56%	\$86.1M
24	Cohen & Steers Capital Management, Inc. - Cohen & Steers Preferred Securities & Income Fd;I	10.39%	\$6082.9M
25	Pacific Income Advisers, Inc. - PIA High Yield Fund;Inst	10.33%	\$90.8M
26	Ares Management - Ares Global Multi-Asset Credit Master Fund, L.P.	10.11%	\$1656.9M
27	Post Advisory Group, L.L.C. - Post Senior Loan	10.06%	\$239.1M
28	Ares Management - Ares US Bank Loan	10.01%	\$998.9M
29	Nuveen, a TIAA Company - Preferred Securities and Income	9.99%	\$9446.5M
30	Loomis, Sayles & Company, L.P. - Loomis Sayles High Income Opportunities Fund;Inst	9.95%	\$277.7M
31	SEI Investments (United States) - SEI Inst Inv High Yield Bond Fund;A	9.91%	\$1984.6M
32	Kornitzer Capital Management Inc. - Buffalo High Yield Fund;Instl	9.89%	\$471.4M
33	Crescent Capital Group - Crescent Syndicated Credit Solutions Strategy	9.84%	\$854.6M
34	Nuveen, a TIAA Company - Nuveen Floating Rate Income Fund;I	9.81%	\$1029.8M
35	Pioneer Investments - Pioneer Floating Rate Fund;Y	9.80%	\$257.3M
36	Ancora Advisors, L.L.C. - Ancora Income Fund;I	9.69%	\$41.9M

37	Nuveen, a TIAA Company - Nuveen Preferred Securities and Income Fund;I	9.65%	\$3641.3M
37	Ares Management - Ares Institutional Loan Fund	9.65%	\$438.5M
39	Legg Mason Partners Fund Advisor, LLC - BrandywineGLOBAL - High Yield Fund;I	9.64%	\$2054.8M
39	Kohlberg Kravis Roberts & Co. - KKR US Bank Loans Strategy	9.64%	\$1745.0M

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- Performance must be calculated "net" of all fees and brokerage commissions. This means after all fees and commissions have been deducted;*
- Performance must be calculated inclusive of all cash reserves;*
- Performance results must be calculated in U.S. dollars, that is, from the perspective of a U.S.-based investor;*
- Performance results must be calculated on an asset base which is at least \$10 million in size for "traditional" U.S. asset classes (equity, fixed income, balanced accounts) or at least \$1 million in the case of international and "alternative" U.S. asset classes;*
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2/25/2025