

# BROADRIDGE TOP 40 Money Managers - 12 Quarters Returns

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Product/Style Category: **U.S. Fixed Income (All Styles)**  
 Performance Measurement Period: **12 Quarters Ending 03/31/2026**  
 Mean Return for the Category and Period: **4.7532%**  
 Universe Size: **1032**



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                                                                          | 12 Quarters ROR | Assets in Composite |
|------|----------------------------------------------------------------------------------------------|-----------------|---------------------|
| 1    | Leader Capital Corporation - Leader Capital Short Term High Yield Bond Fund;Ins              | 13.66%          | \$149.5M            |
| 2    | Pacific Investment Management Company LLC - Commodity PLUS                                   | 13.45%          | \$3213.1M           |
| 3    | Victory Capital Management Inc. - Victory Pioneer CAT Bond Fund;R6                           | 13.19%          | \$206.5M            |
| 4    | Voya Investment Management - Voya Mortgage Investment Fund                                   | 13.03%          | \$1317.7M           |
| 5    | <b>Ulland Investment Advisors, LLC - Intelligent Fixed Income</b>                            | <b>12.06%</b>   | <b>\$192.3M</b>     |
| 6    | Catalyst Capital Advisors, LLC - Catalyst/SMH High Income Fund;I                             | 11.95%          | \$104.2M            |
| 7    | Kohlberg Kravis Roberts & Co. - KKR Structured Credit Non-Investment Grade Strategy          | 11.62%          | \$320.7M            |
| 8    | Concise Capital Management, LP - Concise Short Term High Yield                               | 11.38%          | \$454.7M            |
| 9    | Nuveen, a TIAA Company - Nuveen Preferred Securities & Income Mgd Accts Ptf                  | 11.37%          | \$17.9M             |
| 10   | Nomura Asset Management International - US Convertible Bond                                  | 11.26%          | \$117.1M            |
| 11   | Cohen & Steers Capital Management, Inc. - Cohen & Steers Preferred Securities and In SMA Shs | 11.24%          | \$422.8M            |
| 12   | Camden Asset Management, L.P. - Camden Absolute Return Income                                | 11.13%          | \$37.2M             |
| 13   | East Coast Asset Management, SEZC - East Coast SPC, Strategic Credit SP - Class 2            | 10.58%          | \$190.6M            |
| 14   | Fidelity Institutional Asset Management - High Yield Opportunistic                           | 10.45%          | \$769.5M            |
| 15   | SSI Investment Management LLC - SSI Outright Investment Grade Convertible                    | 10.23%          | \$25.4M             |
| 16   | Nuveen, a TIAA Company - Nuveen Preferred Securities and Income Fund;I                       | 10.07%          | \$4293.6M           |
| 17   | SSI Investment Management LLC - SSI Investment Grade Convertible Capped Strategy             | 9.98%           | \$60.7M             |
| 17   | First Trust Advisors, LP - First Trust Preferred Securities and Income;I                     | 9.98%           | \$149.7M            |
| 19   | Nuveen, a TIAA Company - Nuveen Credit Income Fund;I                                         | 9.91%           | \$342.4M            |
| 20   | J.P. Morgan Asset Management - JPMorgan Preferred and Income Securities Fund;I               | 9.69%           | \$873.5M            |
| 21   | Flaherty & Crumrine, Inc. - Preferred Securities                                             | 9.61%           | \$3230.7M           |
| 22   | Kohlberg Kravis Roberts & Co. - KKR Opportunistic Credit Strategy                            | 9.58%           | \$5793.1M           |
| 23   | American Beacon Advisors, Inc. - American Beacon SiM High Yield Opportunities;R5             | 9.56%           | \$325.1M            |
| 24   | Payden & Rygel - High Yield                                                                  | 9.51%           | \$1560.7M           |
| 25   | Cohen & Steers Capital Management, Inc. - Cohen & Steers Preferred Securities & Income Fd;I  | 9.29%           | \$6068.5M           |
| 26   | Liberty Street Advisors, Inc - Bramshill Multi-Strategy Income Fd;Inst                       | 9.21%           | \$328.7M            |
| 26   | Loomis, Sayles & Company, L.P. - Loomis Sayles High Income Opportunities Fund;Inst           | 9.21%           | \$300.1M            |
| 28   | Columbia Management Investments - Columbia Multisector Bond SMA Completion Portfolio         | 9.16%           | \$108.8M            |
| 29   | T. Rowe Price Associates, Inc. - Credit Opportunities Strategy                               | 9.08%           | \$374.8M            |
| 30   | SEI Investments (United States) - SEI Inst Inv High Yield Bond Fund;A                        | 9.06%           | \$2075.4M           |
| 31   | American Century Investments - American Century High Income Fund;G                           | 8.98%           | \$708.1M            |
| 32   | Legg Mason Partners Fund Advisor, LLC - Western Asset High Yield Fund;I                      | 8.95%           | \$18.1M             |
| 33   | Fidelity Institutional Asset Management - High Yield Core                                    | 8.92%           | \$15796.6M          |
| 33   | Nuveen, a TIAA Company - Nuveen High Yield Income Fund;I                                     | 8.92%           | \$422.4M            |
| 35   | Artisan Partners Limited Partnership - Artisan High Income – Limited Availability            | 8.90%           | \$13262.7M          |
| 36   | T. Rowe Price Associates, Inc. - T Rowe Price Credit Opportunities Fund;I                    | 8.89%           | \$186.5M            |

|    |                                                                      |       |                |
|----|----------------------------------------------------------------------|-------|----------------|
| 37 | BlackRock, Inc. - BlackRock High Yield Bond                          | 8.87% | \$29427.6M     |
| 38 | SMH Capital Advisors, LLC - SMH Institutional High Yield Opportunity | 8.86% | \$335138292.5M |
| 39 | Pacific Investment Management Company LLC - Global High Yield        | 8.81% | \$442.4M       |
| 40 | Polen Capital Management, LLC - Polen U.S. High Yield                | 8.78% | \$162.0M       |

*No compensation has been provided directly or indirectly by Ulland Investment Advisors, LLC in connection with obtaining or using the third-party rating. Rankings released 6/1/2026.*

*Best Money Managers is a comprehensive survey of institutional money managers' performance. All rankings in this publication have met the following requirements:*

- 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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