

# WRIGHT

WRIGHT INVESTORS' SERVICE

177 West Putnam Avenue  
Greenwich, Connecticut 06830-5203 USA



## Wright Investors' Service, Inc. Named Top Guns Manager by Informa Investment Solutions

**Greenwich, Connecticut, February 20, 2018** – Wright Investors' Service, Inc. announced today that the Wright Large Cap Core Equity strategy has been awarded a Top Guns designation by Informa Investment Solutions' PSN manager database, North America's longest running database of investment managers. Wright Large Cap Core Equity received 2-Star rating for the period ended December 31, 2017.

"The strength of our disciplined investment process is evidenced by the continued recognition of our Large Cap Core Equity Strategy" – **Amit S. Khandwala, Co-CEO & Chief Investment Officer.**

Through a combination of Informa Investment Solutions' proprietary performance screens, PSN 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 Investment Solutions is part of Informa Financial Intelligence, a leading provider of critical decision-making solutions and custom services to financial institutions.

Top Guns firms are awarded a rating ranging from one to six stars, with the number of stars representing continued performance over time. Wright Large Cap Core Equity strategy was named a Top Gun with a Star rating of 2 in the Large Cap Core Universe.

**2-Star Category:** These products were top ten performers within their respective universes, based on returns for the one-year period.

Wright's Large Cap Core Equity strategy aims to outperform the performance of the S&P 500® Index on a risk-adjusted basis by investing in high quality companies with a focus on valuations and investment timing.

“PSN Top Guns, which ranks products in six categories in over 50 universes, is a go-to resource for institutional asset managers and investors in their decision-making process,” said **Ryan Nauman, Vice President, product and market strategist at Informa Financial Intelligence**. “Congratulations to Wright Investors’ Service, Inc. on being named a PSN Top Gun. This highly respected ranking spotlights the 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 Ruth Calderon at [ruth.calderon@informais.com](mailto:ruth.calderon@informais.com).

### **About Informa Investment Solutions**

A market leader in intelligence and software solutions for investment professionals and financial institutions of all sizes, Informa Investment Solutions offers a robust set of analytics and tools to help you grow and retain your business. With a nearly 40-year history, Informa Investment Solutions, part of Informa Financial Intelligence, has set the standard for providing turnkey and customizable applications for performing manager searches, building wealth plans, and producing client reports and investment marketing materials for companies worldwide. For more information, please visit <http://www.informais.com/> and follow <https://twitter.com/InformaInvest>.

### **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 (“Wright”) makes payment to Informa Investment Solutions, Inc. (“ISS”) 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 ISS to receive access to ISS ranking reports to acquire reproduction and distribution rights with respect to the award information, however, the purchase of ISS ranking reports is not required to be considered for, or to receive, ISS awards.



ACHIEVES

# PSN Top Guns Ratings

for period ending December 31, 2017



## Wright Investors' Service, Inc.

Wright Investors' Service, Inc., a subsidiary of Wright Investors' Service Holdings, Inc, is an internationally recognized investment management and financial advisory firm. Headquartered in Greenwich, CT, Wright's assets under management are \$1.4 billion as of December 31, 2017.

## 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 December 31, 2017

Wright Investors' Service, Inc. earned a Top Guns rating from PSN for the period ended December 31, 2017. Wright's Dividend Income Equity strategy ranked among the highest performers in PSN's December 31, 2017 Top Guns ratings - receiving a 2 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 widely by institutional asset managers and investors.

The 2 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. These top performers are strictly based on returns for one year period. Wright Investors' Service ("Wright") makes payment to Informa Investment Solutions, Inc. ("ISS") 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 ISS to receive access to ISS ranking reports to acquire reproduction and distribution rights with respect to the award information, however, the purchase of ISS ranking reports is not required to be considered for, or to receive, ISS awards.

<sup>1</sup> The PSN Large Cap Core Universe is comprised of 210 firms and 358 products.

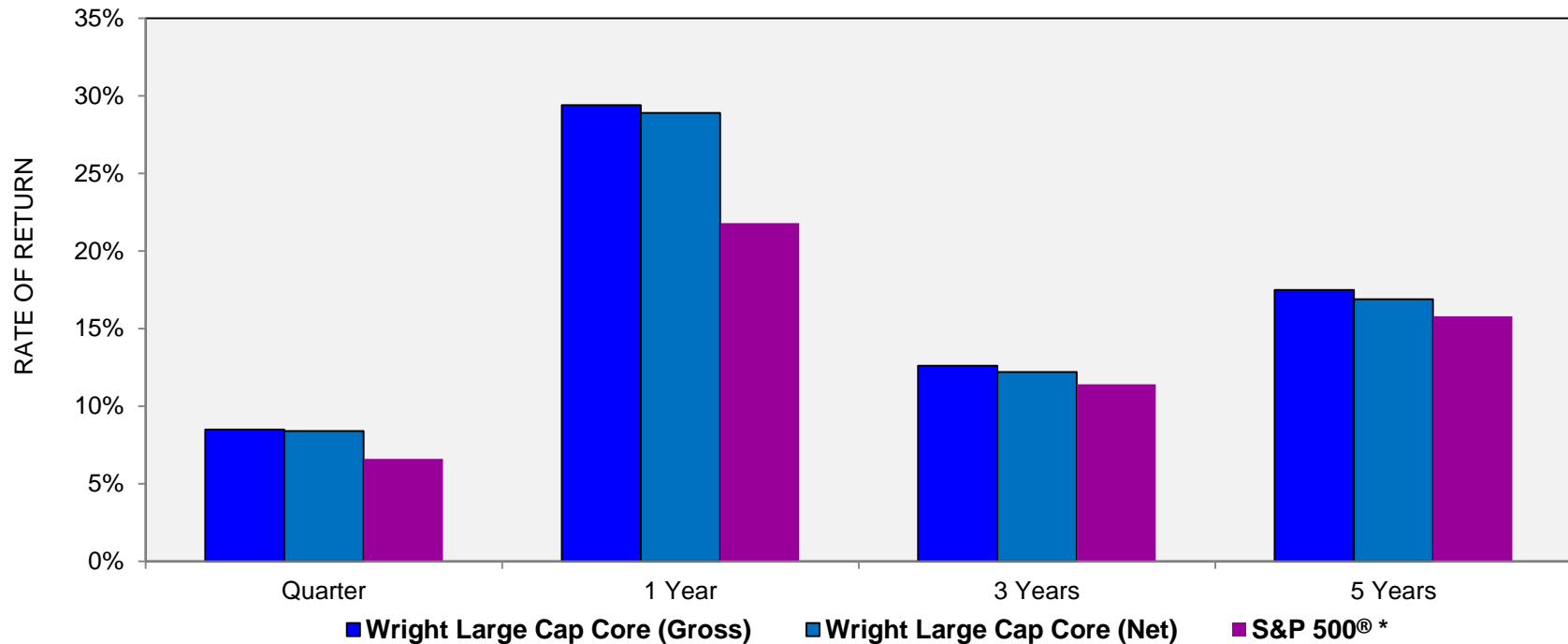
Source: Informa Investment Solutions website, <http://www.informais.com>

177 West Putnam Avenue • Greenwich, Connecticut 06830-5203 • (203) 783-4400  
[www.wrightinvestors.com](http://www.wrightinvestors.com)

Copyright © 2018 Wright Investors' Service, Inc.

# WRIGHT INVESTORS' SERVICE, INC. LARGE CAP CORE EQUITY

PERIODS ENDING DECEMBER 31, 2017



	Quarter	1 Year	3 Years	5 Years
<b>Gross</b>	<b>8.5%</b>	<b>29.4%</b>	<b>12.6%</b>	<b>17.5%</b>
<b>Net</b>	<b>8.4%</b>	<b>28.9%</b>	<b>12.2%</b>	<b>16.9%</b>
<b>Benchmark</b>	<b>6.6%</b>	<b>21.8%</b>	<b>11.4%</b>	<b>15.8%</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 S&P 500 Index is relevant to evaluating Wright Large Cap Core Equity, it is for illustration and discussion purposes only and should not be relied upon.*

PAST PERFORMANCE IS NOT INDICATIVE OF FUTURE RESULTS