



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, August 15, 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 a Bull & Bear Masters rating for the period ended June 30, 2018.

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

Through a combination of Informa Investment Solutions' proprietary performance screens, PSN Top Guns ranks products 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.

Wright Large Cap Core Equity strategy was ranked among the highest performers in PSN receiving a Bull & Bear Masters rating in the Core Universe and in the Large Cap Core Universe.

**Bull & Bear Masters:** Products must have an R-Squared of 0.80 or greater relative to the style benchmark for a three-year period. Moreover, products must have an upside market capture over 100 and a downside market capture less than 100 relative to the style benchmark. The top ten ratios of Upside Capture Ratio over Downside Capture Ratio become the PSN Bull & Bear Masters.

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**

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**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.



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**PSN**

## Bull & Bear Masters Ratings

for period ending June 30, 2018

**Bull & Bear Masters**

**Large Cap Core Equity<sup>1</sup>**

### Wright Investors' Service, Inc.

Wright Investors' Service, Inc., is an internationally recognized investment management and financial advisory firm. Headquartered in Greenwich, CT, Wright's assets under management are \$1.3 billion as of June 30, 2018.

### 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 June 30, 2018

Wright Investors' Service, Inc. earned a Bull & Bear Masters rating from PSN for the period ended June 30, 2018. Wright's Large Cap Core Equity strategy ranked among the highest performers in PSN's June 30, 2018, receiving a Bull & Bear Masters rating.

The Bull & Bear Masters 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. Products must have an R-Squared of 0.80 or greater relative to the style benchmark for a three year period ending June 30, 2018. Moreover, products must have an Upside Market Capture ratio of 100 or more for three year periods ending June 30, 2018, and Downside Market Capture ratio of 100 or less for the latest three year period. The top ten Ratios between Upside Market Capture Ratio and Downside Market Capture Ratio became the PSN Bull & Bear Masters products.

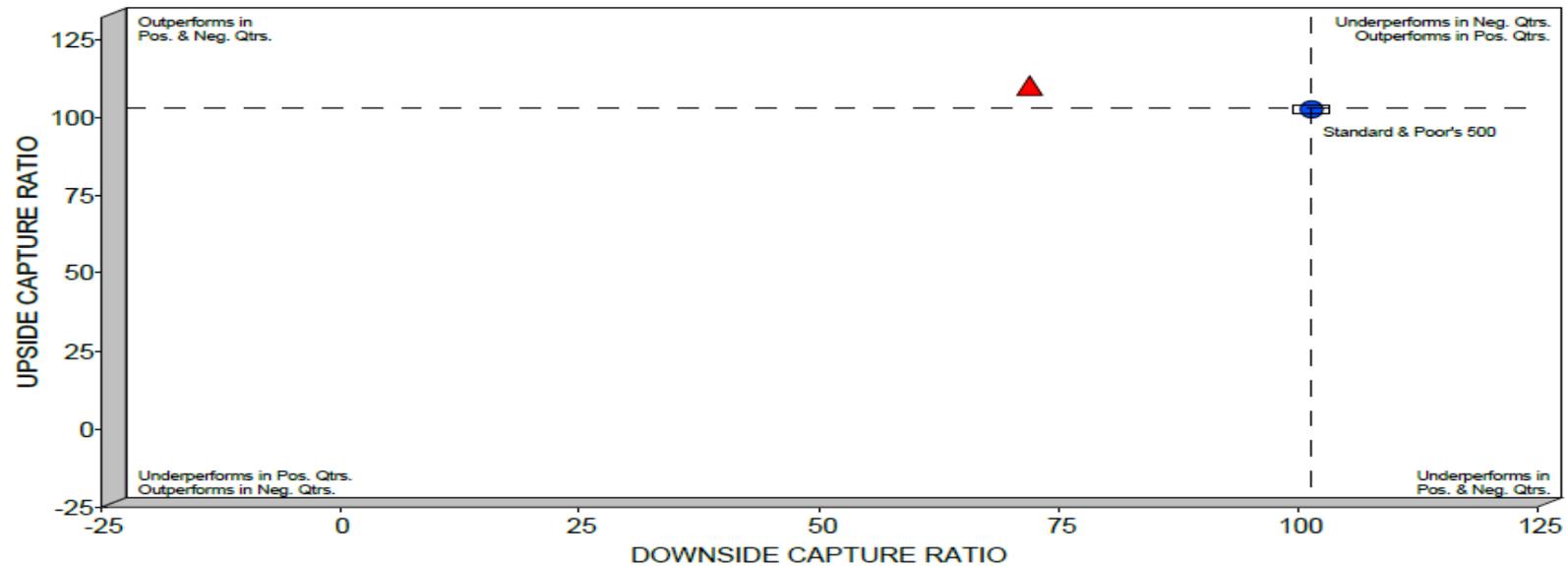
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<sup>1</sup> The PSN Large Cap Core Universe is comprised of 206 firms and 352 products.  
The PSN Core Universe is comprised of 311 firms and 763 products.

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

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

**3 YEAR PERIOD ENDING JUNE 30, 2018**



	Rate of Return	R-Squared	Upside Capture Ratio	Downside Capture Ratio	Upside/Downside Ratio
▲ Wright Large Cap Core	13.78	0.82	107.17	70.83	1.51
● S&P 500®*	11.93	1.00	100.00	100.00	1.00

R-Squared - A statistical measure that represents the percentage of a fund or security's movements that can be explained by movements in a benchmark index. R-squared values range from 0 to 100. An R-squared of 100 means that all movements of a security are completely explained by movements in the index. A high R-squared (between 85 and 100) indicates the fund's performance patterns have been in line with the index. A fund with a low R-squared (70 or less) doesn't act much like the index.

Upside Market Capture Ratio - The Upside Market Capture Ratio measures the manager's performance in up markets relative to the performance of the market (index) itself. An up market is defined as any period (quarter) where the market's return is greater than or equal to zero. The higher the Up Market Capture Ratio, the better the manager grew capital during a market expansion. A value of 110 suggests that a manager's gain was 110% of the market's gain when the market was up.

Downside Market Capture Ratio - measures the manager's performance in down markets relative to the performance of the market (index) itself. A down market is defined as any period (quarter) where the market's return is less than zero. The lower the Down Market Capture Ratio, the better the manager protected capital during a market decline. A value of 90 suggests that a manager's losses were only 90% of the market's loss when the market was down.

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**