



## MAP U.S. Multi-Cap Value Strategy

Product/Style Category:	Quarter(s)	Ranking	Percentile Ranking
U.S. Value Equity	40 Quarters ending 09/30/2023	26 out of 324	92%

Product/Style Category:	Quarter(s)	Ranking	Percentile Ranking
U.S. Diversified/Multi-Cap Value Equity	40 Quarters ending 09/30/2023	7 out of 82	91%

## MAP Global Balanced Strategy

Product/Style Category:	Quarter(s)	Ranking	Percentile Ranking
U.S. Balanced/Multi-Asset (All Styles)	1 Quarter Ending 09/30/2023	34 out of 425	92%

“Our strong **long-term relative performance** speaks to our team's ability to navigate through global economic triumph and turbulence **during full market cycles**. It also underlines the importance of diversification. This is driven by our process, deep intellectual capital and a portfolio management team that has been together for over 25 years. Focusing on the long-term, the portfolio management team seeks to filter out the short-term emotional factors that sometimes cause market disruption. The foundation of our process is extensive, in-house research, coupled with a disciplined valuation process, an abundance of common sense, a healthy dose of humility, and an emphasis on **risk-adjusted returns**” said Michael Dzialo, Founder, President and Chief Investment Officer.

Minimum criteria for inclusion in **Broadridge Best Money Managers**:

- I. Performance must be calculated "net" of all fees and brokerage commissions. This means after all fees have been deducted.
- II. Performance must be calculated inclusive of all cash reserves.
- III. Performance results must be calculated in U.S. dollars, that is, from the perspective of a U.S.-based investor.
- IV. 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, and balanced accounts) or at least \$1 million in the case of international and "alternative" U.S. asset classes.
- V. The classification of the product must fall into one of the categories which Broadridge ranks. Broadridge only publishes rankings for categories/time period combinations for which we have at least 20 contenders.



## About Us:

### **Managed Asset Portfolios, LLC (MAP)**

From its start as a single-family office for one of the wealthiest families in America, Rochester, Michigan-based Managed Asset Portfolios, LLC has since grown to become a globally recognized, independent SEC-registered investment advisory firm serving 500 families across the world with over \$1 billion under management and advisement.

Managed Asset Portfolios claims compliance with the Global Investment Performance Standards (GIPS®). To obtain a GIPS Report and/or policies for valuing investments, calculating performance, and preparing GIPS Reports visit our website at: [www.managedassetportfolios.com](http://www.managedassetportfolios.com) or call us directly at (248) 601-6677.

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The “BROADRIDGE Best Money Managers, powered by Lipper” ranks investment managers against peers that have submitted performance history to the Broadridge/Lipper Marketplace database. Performance rankings are available for the most recent quarter, 4 quarter, 12 quarter, 20 quarter and 40 quarter periods. Investment managers are ranked by investment strategy performance relative to peers. Broadridge rankings are not intended to constitute investment advice or predict future results. Rankings are generally based upon information prepared and submitted by advisers. Although obtained from sources deemed reliable, neither Managed Asset Portfolios, LLC (MAP), nor Broadridge, can guarantee the accuracy of data used to create rankings. In addition to periods of positive returns, the U.S. Multi-Cap Value and Global Balanced Strategy (Fact Sheets can be found [here](#)) may have experienced some periods of negative returns during the award time frames. Comparison results are historical. There is no guarantee that any investment will achieve its objectives, generate profits, or avoid losses. Please visit the Broadridge Marketplace website (<https://marketplace.broadridge.com/marketplace>) for more details about the “BROADRIDGE Best Money Managers, Powered by Lipper” rankings.

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