



MANAGED ASSET PORTFOLIOS

950 W. University, Suite 100  
Rochester, MI 48307 USA  
[www.managedassetportfolios.com](http://www.managedassetportfolios.com)

News Release

## Managed Asset Portfolios' Global Equity Composite and Global Balanced Composite Ranked in Best Money Managers by Broadridge, Powered by Lipper

March 3, 2019

ROCHESTER, Mich.--Managed Asset Portfolios, LLC (MAP), a Rochester, Michigan-based independent investment advisor, was recognized in Best Money Managers rankings<sup>1</sup> by Broadridge (powered by Lipper) for both its Global Equity Composite and Global Balanced Composite for the period ending 12/31/2018.

Product Name	Asset Class	Time Period Ending 12/31/2018	Ranking	# of Strategies	Percentile (%)
MAP Global Equity	International Equity (All Mandates)	4 Quarters	22	1004	97.81%
MAP Global Equity	International Equity (Global Mandates)	4 Quarters	22	323	93.19%
MAP Global Equity	International Equity (Global Mandates)	1 Quarter	30	339	91.15%
MAP Balanced	U.S. Tactical Asset Allocation	1 Quarter	38	273	86.08%
MAP Balanced	U.S. Tactical Asset Allocation	4 Quarters	23	269	91.45%

These high-conviction global value composites are managed by the investment team of Michael Dzialo, Peter Swan, and Karen Culver and have been available to institutional and retail investors since 2001. The team has worked together closely for over 20 years, and that continuity has been vital to MAP's consistent long-term performance. MAP is a disciplined global value manager that utilizes rigorous selectivity with respect to capitalization, geography, and sector, while being ever mindful to risk management.

Founder, President, and Chief Investment Officer Michael Dzialo attributes the continued success to "developing and maintaining portfolios that are highly focused and concentrated in specific areas. MAP is expressly not an index fund or a closet indexer. We are not opposed to being overweight what we like and underweight or totally absent from what we don't like."

<sup>1</sup> Minimum Criteria for Inclusion in Best Money Managers: 1) Performance must be calculated "net" of all fees and brokerage commissions. This means after all fees have been deducted. 2) Performance must be calculated inclusive of all cash reserves. 3) Performance results must be calculated in U.S. dollars, that is, from the perspective of a U.S.-based investor. 4) 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. 5) 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 they have at least 20 contenders.

## **About Managed Asset Portfolios:**

Managed Asset Portfolios is a boutique, independent SEC-registered investment advisory firm with a commitment to global value investing. With successful beginnings as a Single Family Investment Office for one of the wealthiest families in North America, MAP opened its doors to outside investors in 2001. Today, MAP proudly services over 500 families, family offices and institutions across the U.S. and around the globe. For more information, please visit our website at: [www.managedassetportfolios.com](http://www.managedassetportfolios.com).

Managed Asset Portfolios claims compliance with the Global Investment Performance Standards (GIPS®). To obtain a compliant performance presentation, current fact sheet, and/or the firm's list of composite descriptions please contact us at 248-601-6677. Past performance is not indicative of future results and there is a possibility of loss.

## **Disclosures:**

Awards and recognitions by unaffiliated financial publications should not be construed by a client or prospective client as a guarantee that the client will experience a certain level of results if MAP is engaged, or continues to be engaged to provide investment advisory services, nor should such awards be construed as a current or past endorsement of MAP or its representatives. Rankings are generally based on information prepared and/or submitted by the recognized adviser. You should not make an investment based upon any such award. Past performance is no guarantee of future results and there is a possibility of loss. MAP did not pay a fee for inclusion on any award or recognition list.

The material provided above is for information only, and is not an offer or recommendation to buy or sell or a solicitation of an offer to buy or sell any security or instrument or to participate in any particular trading strategy.

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 MAP Global Equity and MAP Balanced strategies 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.

SOURCE: Managed Asset Portfolios, LLC

Contact: Office at 248-601-6677, or via the web at <http://managedassetportfolios.com/>