

FOR IMMEDIATE RELEASE

Michael S. Dzialo
President & Chief Investment Officer
Managed Asset Portfolios, LLC
(248) 601-6677
Sales@map-email.com



MANAGED ASSET PORTFOLIOS

Managed Asset Portfolios Earns “5-Star Overall Morningstar Rating™” for Two Global Equity Strategies

Investment Management Team Credits Deep Research Process, Long-Term Focus on Downside Protection

Rochester, MI, April 29th, 2022 -- **Managed Asset Portfolios, LLC (MAP)** was awarded Morningstar’s coveted 5-star overall rating as of March 31, 2022, for two of its portfolio strategies, the Global Equity Composite¹ and Global Equity Composite Ex-Options.²

The Morningstar rankings add to the firm’s already long list of industry awards, including its recent recognition in February as PSN’s “[Top Gun Manager of the Decade](#)” for its U.S. Multi-Cap Value Composite for the 10-year period ending Q4 2021.³

MAP founder Michael Dzialo attributed the high Morningstar ranking to MAP’s rigorous bottom-up research process that seeks to find undervalued stocks that complement its macroeconomic themes. “Unlike index funds, MAP doesn’t want to match a benchmark,” Dzialo said, “Our goal is to outperform on a risk-adjusted basis. We’d rather do extensive work on a few names and invest only in our highest conviction ideas.”

The two composites comprise global value stock portfolios managed by the investment team of Michael Dzialo, Peter Swan, and Karen Culver, a team that has worked together for more than two decades.

As of the first quarter of 2022, Managed Asset Portfolios has over \$1 billion in assets under management, of which approximately \$650 million are in the MAP Global Equity strategies. The Global Equity Composite has been available to MAP clients since 2001 and the Global Equity Composite Ex-Options since 2012.

About Managed Asset Portfolios:

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 or call us directly at (248) 601-6677.

¹The Global Equity Composite is included in the World Large Stock Value Morningstar Category™, which contains 95 composites for the overall and 3-year time period, 90 composites for the 5-year time period, and 65 composites for the 10-year time period.

²The Global Equity Composite Ex-Options is included in the World Large Stock Value Morningstar Category™, which contains 95 composites for the overall and 3-year time periods and 90 composites for the 5-year time period.

³<https://www.managedassetportfolios.com/news/managed-asset-portfolios-awarded-top-guns-manager-of-the-decade-distinction>

© 2022 Morningstar. All Rights Reserved. The information contained herein: (1) is proprietary to Morningstar and/or its content providers; (2) may not be copied or distributed; and (3) is not warranted to be accurate, complete or timely. Neither Morningstar nor its content providers are responsible for any damages or losses arising from any use of this information.

GIPS® is a registered trademark of CFA Institute. CFA Institute does not endorse or promote this organization, nor does it warrant the accuracy or quality of the content contained herein.



Awards 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 they be construed as a current or past endorsement of MAP or its representatives. Rankings are generally based upon information prepared and/or submitted by the recognized adviser. You should not make an investment based solely upon any such award. Past performance is no guarantee of future results. MAP did not pay a fee for inclusion on any award or recognition list.

The material provided 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 content of this release is intended for use by qualified investment professionals. Please consult with an investment professional before making any investment decisions using any content from this release.

Morningstar "Star Rating" Criteria:

The Morningstar Rating™ for funds, or "star rating", is calculated for separate accounts with at least a three-year history. It is calculated based on a Morningstar Risk-Adjusted Return measure that accounts for variation in a managed product's monthly excess performance, placing more emphasis on downward variations and rewarding consistent performance. The top 10% of products in each product category receive 5 stars, the next 22.5% receive 4 stars, the next 35% receive 3 stars, the next 22.5% receive 2 stars, and the bottom 10% receive 1 star. The Overall Morningstar Rating for a managed product is derived from a weighted average of the performance figures associated with its three-, five-, and 10-year (if applicable) Morningstar Rating metrics. The weights are: 100% three-year rating for 36-59 months of total returns, 60% five-year rating/40% three-year rating for 60-119 months of total returns, and 50% 10-year rating/30% five-year rating/20% three-year rating for 120 or more months of total returns. While the 10-year overall star rating formula seems to give the most weight to the 10-year period, the most recent three-year period actually has the greatest impact because it is included in all three rating periods.

SOURCE: Managed Asset Portfolios, LLC

CONTACT: Office at (248) 601-6677 or via the web at <http://managedassetportfolios.com>