



MAP U.S. Multi-Cap Value Strategy

Product/Style Category:	Quarter(s)	Ranking	Percentile Ranking
U.S. Value Equity	40 Quarters ending 12/31/2023	27 out of 330	92%

Product/Style Category:	Quarter(s)	Ranking	Percentile Ranking
U.S. Diversified/Multi-Cap Value Equity	40 Quarters ending 12/31/2023	7 out of 84	92%

“We’re delighted to be recognized once again for our Strategy’s performance. The last decade has been incredibly challenging for traditional value investors. However, we believe investors still understand the importance of including value exposure in their portfolios. While human nature is to seek out managers who have recently outperformed, we find it prudent for investors to examine performance over **full market cycles** that include both bull and bear markets, and suggest they study not only total returns but risk-adjusted returns as well. We credit our consistently high rankings to our disciplined approach, as well as our **focus on long-term risk-adjusted returns**, the foundation of which is our independent, thematic and catalyst-driven fundamental research and a stable, experienced, and collegial team of investment professionals” 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 or call us directly at (248) 601-6677.

Disclosures:

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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 Strategy (factsheet 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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