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News Release

# Managed Asset Portfolios' Global Equity Fund and Global Balanced Fund Earn Highest Overall Ratings from Morningstar<sup>TM</sup>

January 24, 2019

ROCHESTER, Mich.--Managed Asset Portfolios, LLC (MAP), a Rochester, Michigan-based independent investment advisor, announced that it has received Morningstar's highly coveted 5-star rating for both its Global Equity Fund (CAXIX) (for the 3-year period ending 12/31/18 out of 728 funds in the World Large Stock category based on risk-adjusted returns) and Global Balanced Fund (TRXIX) (for the 5-year period ending 12/31/18 out of 322 funds in the World Allocation category based on risk-adjusted returns).

These high-conviction global value funds are managed by the investment team of Michael Dzialo, Peter Swan, and Karen Culver and have been available to institutional and retail investors since 2011. 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."

# **About Managed Asset Portfolios:**

Managed Asset Portfolios (MAP) 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, we opened our doors to outside investors in 2001. Today we proudly service 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.

Managed Asset Portfolios claims compliance with the Global Investment Performance Standards (GIPS®). To obtain a compliant performance presentation 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. Please note that standardized performance for the funds can be found at <a href="https://catalystmf.com/funds/">https://catalystmf.com/funds/</a>.

# **Important Risk Information:**

CAXIX: Investing in the Fund carries certain risks. The risks of investing in the Fund are spelled out in the prospectus, shareholder reports and other regulatory filings.

TRXIX: Investing in the Fund carries certain risks. The risks of investing in the Fund are spelled out in the prospectus, shareholder reports and other regulatory filings.

### **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.

TRXIX is also rated 4-stars by Morningstar for the period ending 12/31/2018, based on 3 year riskadjusted returns, out of 389 funds in the World Allocation category. CAXIX also rated 4-stars by Morningstar for the period ending 12/31/2018, based on 5 year risk-adjusted returns, out of 617 funds in the World Large Stock category. © 2018 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. Past performance is no guarantee of future results.

The Morningstar Rating<sup>™</sup> for funds, or "star rating", is calculated for managed products (including mutual funds, variable annuity and variable life subaccounts, exchange-traded funds, closed-end funds, and separate accounts) with at least a three-year history. Exchange-traded funds and open-ended mutual funds are considered a single population for comparative purposes. 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 Morningstar Rating does not include any adjustment for sales loads. 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). Please note that the Morningstar rankings are for the I share classes only; other classes will have different performance characteristics due to different expense ratios.

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.

Investors should carefully consider the investment objectives, risks, charges and expenses of the Catalyst Funds. This and other important information about the Fund is contained in the prospectus, which can be obtained by calling 866-447-4228 or at www.CatalystMF.com. The prospectus should be read carefully before investing. The Catalyst Funds are distributed by Northern Lights Distributors, LLC, member FINRA/SIPC. Catalyst Capital Advisors, LLC is not affiliated with Northern Lights Distributors, LLC.

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

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