



## Holt-Smith Advisors

### News Update

August 25, 2009

#### **Holt-Smith Advisors Mid-Cap Growth Once Again Beats National Competition “Double Top Gun” Acclaim from PSN Database**

Holt-Smith Advisors, Madison, WI, has been named as **one of the Top Ten best performing managers** by Informa Investment Solutions PSN, an independent national database. Informa ranked Holt-Smith Advisors' Mid-Cap Growth product as a Top Gun, in two different categories, for its 3 year performance ending June 30, 2009. Holt-Smith Advisors is also ranked in the top ten managers in the country for their Mid Cap Growth portfolio for the 5 years ending June 30, 2009.

Many investment advice columns ignore the mid cap area, preferring to focus on large and small companies instead when establishing diversification guidelines. This is a mistake as mid cap companies have historically offered better returns with less volatility.

“Mid Cap stocks are a little known secret to strong returns,” stated Michael Wilson, the lead Mid Cap Growth portfolio manager at Holt-Smith Advisors. “Most equity portfolios, whether conservative or aggressive, should consider an allocation to mid cap stocks. Even since the March, 2009 market bottom, mid caps have in general out performed large caps by over 10%.”

The mid cap stock area is defined by medium size public companies, ranging from \$800 million to \$15 billion in total market capitalization. This has been an extraordinary area as mid-size companies have the ability to expand faster than larger companies. They also tend to be less complex and bureaucratic, and they often have simpler financial statements providing greater transparency of earnings, making it easier for investors to understand the company and its operations.

Holt-Smith Advisors is no stranger to Informa's Top Gun list. These two placements are **the 18<sup>th</sup> and 19<sup>th</sup> time the firm is listed as one of the top ten best performing managers** since 2000 by Informa. Marilyn Holt-Smith, CFA, Managing Director stated: “This is a great acknowledgement of the success of our investment portfolio philosophy. Our investment team focuses on a *Best Ideas* approach which keeps our buy and sells process very disciplined. That discipline has paid off contributing to our very competitive returns. All three of our proprietary equity products have achieved this Top Gun recognition over the years.”

**About Holt-Smith Advisors.** Holt-Smith Advisors is an independent, Madison based investment management boutique. Besides the Mid-Cap Growth product, the firm offers other proprietary equity products as well as diversified portfolio management services. Since 1987, the firm's clientele include institutions, pension plans, endowments, foundations and individuals.

**About Informa Investment Solutions, Inc.** For over 30 years, Informa has supplied valuable data and offered custom-made solutions to brokerage firms, money management firms, investment consultants and pension plan sponsors. Headquartered in White Plains, NY, Informa serves more than 1,400 clients with a reliable database of 2,000 investment management firms and 11,000 products worldwide.