



Holt-Smith Advisors

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Holt-Smith Advisors earns “Top Guns” accolade for Large Cap Value performance

Informa Investment Solutions PSN, a national money manager database, has named Holt-Smith Advisors to its list of “Top Guns” managers. Informa creates a Top Guns list of the 10 best performing money managers in the United States for each equity style. Holt-Smith Advisors’ Large Cap Value product was named to the Top Guns listing based on its strong performance for the quarter and the one year ended March 31, 2008. The PSN database monitors 6,547 investment products, of which 397 are included in the Large Cap Value universe.

Noel Goeddel, CFA, the Holt-Smith Advisors team leader for the Large Cap Value product, said: “I’m pleasantly surprised by this ranking. When we started this product almost three years ago, we believed our investment process was a winner. But to outperform the best of the best large cap value managers during a very difficult market environment certainly reinforces our disciplined investment approach.”

Despite being a relatively small, unknown firm located in Madison, Wisconsin, Holt-Smith Advisors is no stranger to the Top Guns lists. Their equity products have been nationally recognized by Informa for outstanding investment performance 15 times since 2000. “Our focus is on a “best ideas” approach with our concentrated equity philosophy”, stated Ryan Erickson, CFA, Chief Investment Officer. “By combining our proprietary products in a portfolio, our clients have an opportunity to outperform while providing a reasonable level of diversification.”

For over 20 years, Holt-Smith Advisors has been an independent, locally owned investment management boutique firm. The Holt-Smith Advisors Large Cap Value product is one of three proprietary equity products offered to institutions and individuals for customized portfolio management solutions. Mid Cap Growth and Large Cap Growth products are offered as well.