



**MARTIN CAPITAL  
ADVISORS  
LLP**

*A Registered Investment Advisor*

**Financial Intelligence**  
Informa



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## **Martin Capital Advisors, LLP, Awarded Top Guns Designation by Informa Financial Intelligence**

**San Antonio, TX— November 20, 2023** — Martin Capital Advisors, LLP, (MCA) has been awarded multiple PSN Top Guns distinctions by Informa Financial Intelligence’s PSN manager database, North America’s longest running database of investment managers.

MCA was honored with 2 Top Guns ratings for its Flexible Growth, Balanced and Conservative portfolio strategies for performance through September 30, 2023. Top Gun firms are awarded a rating ranging from one to six stars, with the number of stars representing outstanding performance for various time periods.

The PSN Top Guns designations (please see Star time period descriptions below) for Martin Capital Advisors, LLP (MCA) through September 30, 2023 include:

**MCA Flexible Growth 2 Stars All Cap Core Equity Universe  
MCA Balanced 2 Stars US Balanced Universe**

A description of each category is listed below:

[1-Star Category:] had one of the top ten returns for the quarter in their respective universe.

[2-Star Category:] had one of the top ten returns for the one-year period in their respective universes.

[3-Star Category:] had one of the top ten returns for the three-year period in their respective universes

[4-Star Category:] had an r-squared of 0.80 or greater relative to the style benchmark for the recent five-year period. Moreover, returns must have exceeded the appropriate style benchmark for the three latest three-year rolling periods. The top ten returns for the latest three-year period then become the 4 Star Top Guns.

[Bull & Bear Masters:] had an r-squared of 0.80 or greater relative to the style benchmark for a three-year period. Moreover, products must have an upside market capture over 100 and a downside market capture less than 100 relative to the style benchmark. The top ten ratios of Upside Capture Ratio over Downside Capture Ratio become the PSN Bull & Bear Masters.

Through a combination of Informa Financial Intelligence’s proprietary performance screens, [\\*PSN Top Guns](#) (\*free registration to view Top Guns) ranks products in six proprietary categories in over 50 universes. This is a well-respected quarterly ranking and is widely used by institutional asset managers and investors. Informa Financial Intelligence is part of Informa plc, a leading provider of critical decision-making solutions and custom services to financial institutions.

“Congratulations to Martin Capital Advisors, LLP, for being recognized as a PSN Top Gun,” said [Ryan Nauman](#), *Market Strategist at Informa Financial Intelligence’s Zephyr*. “This highly esteemed designation allows us to recognize success, excellence and performance of leading investment managers each quarter.”

The complete list of PSN Top Guns and an overview of the methodology can be located on <https://psn.fi.informais.com/>

For more details on the methodology behind the PSN Top Guns Rankings or to purchase PSN Top Guns Reports, contact Margaret Tobiasen at [Margaret.tobiasen@informa.com](mailto:Margaret.tobiasen@informa.com)

### **About Martin Capital Advisors, LLP**

Martin Capital Advisors, LLP, (MCA) a registered investment advisor based in San Antonio, TX, specializes in managing investment portfolios for long-term capital appreciation. Paul Martin, managing partner and chief investment officer of MCA, founded the firm in 1989. The firm’s investment portfolio performances have often been ranked at or near the top of all diversified investment strategies for over three decades.

### **About Informa Financial Intelligence’s Zephyr**

Financial Intelligence, part of the Informa Intelligence Division of Informa plc, is a leading provider of products and services helping financial institutions around the world cut through the noise and take decisive action. Informa Financial Intelligence’s solutions provide unparalleled insight into market opportunity, competitive performance and customer segment behavioral patterns and performance through specialized industry research, intelligence, and insight. IFI’s Zephyr portfolio supports asset allocation, investment analysis, portfolio construction, and client communications that combine to help advisors and portfolio managers retain and grow client relationships. For more information about IFI, visit <https://financialintelligence.informa.com>. For more information about Zephyr’s PSN Separately Managed Accounts data, visit <https://financialintelligence.informa.com/products-and-services/data-analysis-and-tools/psn-sma>.

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