



## REFINITIV LIPPER FUND AWARDS

### AXS Alternative Growth Fund Wins 2020 Lipper Award

Fund Recognized as Best Alternative Long/Short Equity Fund for Consistently Strong Performance

**NEW YORK, March 6, 2020** – AXS Investments, a leading alternative investment manager, today announced that its [AXS Alternative Growth Fund](#) (EEHIX) is the recipient of the Refinitiv 2020 Lipper Fund Award for delivering historically strong risk-adjusted returns over a five-year period in the Alternative Long/Short Equity Funds category. The awards were announced on March 5 in New York City.

“It’s an honor to be recognized by Lipper for the strong, consistent performance of our AXS Alternative Growth Fund,” said Greg Bassuk, CEO of AXS Investments. “We are proud to continue our success in providing investors access to alternative sources of investment returns. EEHIX is emblematic of our diversified funds platform, as the fund offers investors a long-term, proven strategy designed to achieve equity upside while managing downside risk.”

The fund seeks to provide investors both upside potential through equity market exposure and downside protection through an innovative portfolio of S&P 500 index futures contracts, dynamic hedging and diversified managed futures strategies.

The Fund received an overall Morningstar rating of 5 stars and ranked #1 in the Morningstar long-short equity category based on three- and five-year risk-adjusted returns as of January 31, 2020. The Fund also earned a 5-star rating out of 193 funds and a 5-star rating out of 144 funds, based on three- and five-year returns.

BarclayHedge, an industry leading provider of alternative investment data, named AXS Alternative Growth Fund the 15<sup>th</sup> best CTA Performer out of 645 eligible funds based on 2019 returns.

The Refinitiv Lipper Fund Awards are granted to funds and fund management firms in 20 countries worldwide for their consistently strong risk-adjusted three-, five- and 10-year performance relative to their peers, based on Lipper’s proprietary performance-based methodology.

#### About AXS Investments

[AXS Investments](#) is a leading alternative investment manager providing a diversified family of alternative investment funds for individual investors, financial advisors, family offices and others seeking alternatives to traditional equity and fixed income investments. The firm empowers investors to diversify their portfolios with investments previously available only to the largest institutional and high net worth investors. The firm’s investor-friendly funds are time-tested, liquid and transparent, sub-advised by top institutional investment managers with long and strong track records. For more information, visit [www.axsinvestments.com](http://www.axsinvestments.com).



**Media Contact**  
Andrew Ceccon  
Chief Marketing Officer  
914.639.2904  
[aceccon@axsinvestments.com](mailto:aceccon@axsinvestments.com)



[axsinvestments.com](http://axsinvestments.com)



833.AXS.ALTS  
(833.297.2587)

## About Lipper Fund Awards

For more than three decades and in over 20 countries worldwide, the Lipper Fund Awards have honored funds and fund management firms that have excelled in providing consistently strong risk-adjusted performance relative to their peers. Renowned fund data and proprietary methodology is the foundation of the Award qualification. Individual classifications of three-, five-, and ten-year periods, as well as fund families with high average scores for the three-year period are recognized. For more information, please contact [enquiries.awards@refinitiv.com](mailto:enquiries.awards@refinitiv.com) or visit [www.lipperfundawards.com](http://www.lipperfundawards.com).

## About Morningstar Ratings

The Morningstar Rating™ 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) Morningstar Rating metrics.

The weights are: 100% three-year rating for 36-59 months of total returns, 60% five-year rating/40% three-year rating for 60-119 months of total returns, and 50% 10-year rating/30% five-year rating/20% three-year rating for 120 or more months of total returns. While the 10-year overall star rating formula seems to give the most weight to the 10-year period, the most recent three-year period actually has the greatest impact because it is included in all three rating periods. Morningstar Rating is for the I share classes; other classes may have different performance characteristics.

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Ratings, rankings and awards should not be used as the sole basis for evaluating a fund. For more information including standard performance, visit [AXS Alternative Growth Fund](#).

There are risks involved with investing including the possible loss of principal. Past performance does not guarantee future results. **Investors should carefully consider the investment objectives, risks, charges and expenses of the fund before investing. To obtain a prospectus containing this and other important information, please [click here](#) to view or download a prospectus online. Read the fund's prospectus carefully before you invest.**

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