

## **Shelter Rock Management Announces Three SMA Strategies Receive 5 Star Overall Rating from Morningstar. Strategies Now Available to Advisors via RIA Platforms**

**Jericho, New York – May 15, 2025** – Shelter Rock Management, a boutique investment management firm, is proud to announce that its *Equity Income*, *Conservative Allocation* and *Strategic Income* Separately Managed Account (SMA) strategies have earned Morningstar's prestigious five-star overall rating.

This recognition—awarded to strategies that demonstrate the strongest risk-adjusted returns in their respective categories—underscores the strength of Shelter Rock's disciplined investment process and long-term performance across multiple market cycles.

Additionally, Shelter Rock Management is excited to announce that its investment strategies, previously available exclusively to high-net-clients are now accessible to financial advisors through the leading RIA custodian platforms.

"Morningstar's five-star overall rating is a testament to the disciplined investment processes that we have developed over the last two decades," said Sean Chaitman, CEO and Founder of Shelter Rock Management. "By following our rigorous investment framework, we have built a successful long-term track record managing our strategies through both bull and bear markets. Furthermore, we are excited to now offer our SMA strategies to the broader advisor community."

For more information about Shelter Rock Management's strategies please visit:

[www.shelterrockmanagement.com](http://www.shelterrockmanagement.com)

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### **About Shelter Rock Management**

Founded in 2006, Shelter Rock Management is an independent investment management firm that is focused on generating attractive long-term returns and protecting capital.

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### **Equity Income SMA**

**Morningstar Category:** Moderate Allocation

<b>Time Period</b>	<b>Percent ile</b>	<b>Category Rank</b>
1-Year	Top 7%	43 of 680
3-Year	Top 1%	6 of 636
5-Year	Top 6%	30 of 565
10-Year	Top 2%	7 of 394

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### **Conservative Allocation SMA**

## **Morningstar Category: Moderately Conservative Allocation**

<b>Time Period</b>	<b>Percentile</b>	<b>Category Rank</b>
1-Year	Top 11%	50 of 487
3-Year	Top 2%	8 of 460
5-Year	Top 12%	49 of 418
10-Year	Top 6%	16 of 271

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## **Strategic Income SMA**

### **Morningstar Category: Short-Term Bond**

<b>Time Period</b>	<b>Percentile</b>	<b>Category Rank</b>
1-Year	Top 6%	20 of 376
3-Year	Top 9%	34 of 369
5-Year	Top 1%	3 of 348
10-Year	Top 1%	1 of 298

## **DISCLOSURE**

Morningstar rankings are based on total return within each respective category and are subject to change. Rankings shown are as of 3/31/2025. The Morningstar Rating™ for separately managed accounts, commonly called the "star rating," is calculated for SMA composites based on a risk-adjusted return measure. Morningstar ranks SMA strategies within peer categories over various time periods (1-,3-,5-, and 10-years) and assigns star ratings accordingly. Rankings reflect a strategy's standing relative to its category peers at the time of publication. The Morningstar Rating™ is derived from a weighted average of the performance figures associated with a strategy's three-, five-, and ten-year (if applicable) risk-adjusted returns. Rankings and ratings are as of March 31, 2025, and are subject to change monthly. Only SMA strategies with at least three years of performance history and adequate asset coverage are eligible to receive a Morningstar Rating. The Morningstar Rating does not reflect any fees an investor may pay, including platform fees, manager fees, or transaction costs, and does not constitute an offer or solicitation to buy or sell any securities.

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