Lipper ranks Hancock Burkenroad Fund No. 1

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Thomson Reuters Lipper ranked the Hancock Horizon Burkenroad Small Cap Fund, which utilizes Burkenroad Reports as a primary source of research and invests in many of the companies recommended by the program's student analysts, as the top-performing fund since 2001 in the small cap blended category.

The mutual fund inspired by Burkenroad Reports, the Freeman School’s acclaimed equity analysis program, celebrated its 15th birthday in December with a very

special honor.

Based on its performance since 2001, Thomson Reuters Lipper ranked the Hancock Horizon Burkenroad Small Cap Fund No. 1 in the small cap blended category. In earning that distinction, it outperformed 237 funds in the category.

In addition, Thomson Reuters Lipper ranked the Burkenroad Fund 15th out of more than 17,000 equity funds for the same period, placing it in the top .1 percent of fund in the category.

The Burkenroad Fund is part of the Hancock Horizon Family of Funds. Hancock Horizon Investments manages the fund and makes all investment decisions, but the fund's managers utilize Burkenroad Reports as a primary source of research and invest in many of the regional small-cap stocks recommended by the program's student analysts.

"Credit for the fund's performance belongs solely to Hancock Horizon Investments, but we're thrilled to contribute our name and research to this incredibly successful offering," said Ira Solomon, dean of the Freeman School. "It's a great advertisement for Burkenroad Reports and the Freeman School."

"It's just incredible," added Peter Ricchiuti, professor of practice and founder of Burkenroad Reports. "Small public companies in the Deep South tend to fly under the radar of Wall Street, but results like these show we're fishing in the right pond."

Since 2001, the small-cap Russell 2000 Index — which measures the performance of the small-cap segment of the U.S. equity market — has generated a return of 239 percent while the large-cap S&P 500 has returned 164 percent. The Burkenroad Fund performed even better, generating a return of 429 percent over that period.

Burkenroad Reports was founded in 1993 to provide unbiased research on small-cap stocks across the Southeast, a category traditionally underfollowed by Wall Street. Each year, more than 200 student analysts visit the companies, meet with senior management and write detailed equity research reports that are read by thousands of investment professionals across the U.S. In the process, those students gain real-world experience that translates into job offers. To date, more than 600 graduates of the program have gone on to successful careers in the investment field.

“A lot of investment firms already know about Burkenroad Reports, but with eye-popping results like these, we’re hoping the Burkenroad Fund will help open a few more doors for our students,” Ricchiuti said. “This is the kind of publicity you just can’t buy.”

Tulane University and the A. B. Freeman School of Business will host the 21st annual Burkenroad Reports Investment Conference on Friday, April 28, at the Sheraton Hotel in New Orleans. For more information and to register, visit www.burkenroad.org.