

Credo UCITS Funds celebrate successful 5-year track record

Credo is pleased to announce that its UCITS fund products, **Credo Global Equity Fund** and **Credo Dynamic Fund**, both celebrated their five-year anniversaries on 3 July 2022.

The UCITS funds were launched in July 2017 in order to provide investors with an alternative to Credo's traditional managed portfolio services. Because of their lower investment thresholds, the funds allow smaller investors to invest with Credo, making them an ideal solution for retail investors as well as professional asset allocators. Credo Global Equity and Dynamic funds are widely available on UK investment platforms and in addition are both 4 Diamond rated by Defaqto.

The **Credo Global Equity Fund** is listed in the IA Global sector and adopts a Value-based approach, with a concentrated portfolio of high quality large-cap stocks. The Fund ranks in the 2nd Quartile over the 5 years since launch, returning 45.8% versus the IA Global sector average of 43.1% (Source FE fundinfo 03/07/2017 – 01/07/2022).

Credo Dynamic Fund sits in the IA Flexible sector and aims to achieve equity-style returns with lower volatility. The Fund has a sterling bias and is generally split between equities, corporate bonds and alternatives. The Fund ranks in the 1st Quartile in the 5 years since launch, returning 36% versus the IA Flexible sector average of 20.6% (Source: FE fundinfo 03/07/2017 – 01/07/2022).

Charles van der Merwe, Chief Executive Officer at Credo, said: *"We are delighted to reach the 5-year anniversary for our UCITS funds and pleased to achieve strong performance for our investors. With the funds being increasingly available on investment platforms, we look forward to continuing to grow the funds, both through financial intermediaries and directly through private investors."*

The Credo UCITS funds are available across a number of leading and specialist investment platforms, as well as directly via Credo.

Credo is an independently owned wealth management services business established in the UK in 1998. Credo provides investment solutions and a wealth platform to both Financial Intermediaries and Private Clients, with more than £4.4bn assets under custody and £1.2bn assets under management. Credo has offices in the United Kingdom and South Africa.

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