

Academy of Funds

Summary for Advisers | Quarter 1 2025

New ratings:



GMO Quality Investment Fund New Rating
Jupiter Strategic Absolute Return Bond
Dimensional EM Value
Rathbone Global Opportunities



TwentyFour Sustainable Short Term Bond
Income



GS Sovereign Green Bond



Most Viewed Active Funds

1. WS Havelock Global Select A Acc
2. WS Amati UK Listed Smaller Companies B Acc
3. Redwheel Global Emerging Markets R GBP



Most Viewed Responsible Funds

1. Vontobel Fd TwentyFour Sust ST Bd Inc AN GBP
2. Wellington Global Impact Bond GBP S AccH
3. Royal London Sustainable World Trust C Acc



Most Viewed Passive Funds

1. Fidelity Index US P Acc
2. Legal & General All Stocks Gilt Index I Inc
3. Vanguard Global Bond Index GBP Hedged Dist



Most Viewed Fund Dashboards

1. WS Havelock Global Select A Acc
2. Vontobel Fd TwentyFour Sust ST Bd Inc AN GBP
3. WS Amati UK Listed Smaller Companies B Acc



Most Searched Groups

1. Havelock
2. Schroder Investment Management
3. Jupiter Asset Management



Most Viewed Sectors

1. IA Global
2. IA UK All Companies
3. IA Sterling Strategic Bond



Square Mile Investment Consulting & Research Limited



info@squaremileresearch.com



squaremileresearch.com



Important Information

This document is issued by Square Mile Investment Consulting and Research Limited which is registered in England and Wales (08791142) and is a wholly owned subsidiary of Titan Wealth Holdings Limited (Registered Address: 101 Wigmore Street, London, W1U 1QU).

This document is aimed at professional advisers and regulated firms only and should not be passed on to or relied upon by any other persons, for the purposes of the FCA rules and it must not be distributed to retail clients. The information and any associated attachments are strictly confidential, may only be used for internal use by the intended recipient, may not be reproduced or disseminated in any form and may not be used as a basis for, or a component of, any financial instruments or products or indices. It is issued by and remains the copyright of Square Mile Investment Consulting and Research Limited ("SM").

This document does not constitute an offer to sell or invitation to buy or invest in any products mentioned herein it does not provide or offer financial investment, tax, legal, regulatory or other advice and recipients of this document must not rely on it as providing any form of advice. Recipients who may be considering making an investment should seek their own independent professional advice. None of the information contained in the document constitutes a recommendation that any particular investment strategy is suitable for any specific person. Further information, including a discussion of the risks of an investment, is set out in the relevant offering memorandum or prospectus. This document is published and provided for informational purposes only. This is not a recommendation to engage in any investment activities with any regulated firms or a recommendation to buy or sell any funds or individual stocks.

The information and analysis contained herein is based on sources believed to be reliable, however, we do not guarantee their timeliness, accuracy or completeness, nor do we accept liability for any loss or damage resulting from your use of this document. The information contained within constitutes the author's own opinions. The value of any investment may fall as well as rise. Past performance should not be seen as an indication of future performance. Any opinions expressed reflect our current judgment at the date of this document and are subject to change without notice.

Source of data: Square Mile, unless otherwise stated.

Date of data: 31 March 2025.