

Press information

6 February 2013

Index funds top of the pops on Nucleus

Index funds were more popular than ever on Nucleus in 2012, according to the latest fund flow information from the adviser-owned and controlled wrap platform.

The platform, which provides access to over 5,200 assets and recently saw inflows pass £5bn, has revealed that three of the top five largest fund holdings at the end of 2012 were index funds, with Dimensional's Global Short Bond fund taking the top spot followed by L&G's Index Linked Gilt Index Trust. Vanguard's FTSE UK Equity Index fund was in fourth place.

Index funds also dominated the fastest growing funds list on the platform, with Vanguard's FTSE UK Equity Index fund beating Dimensional's Global Core Equity and Short Bond funds into second and third spots respectively with over £80m of inflows in 2012.

Commenting, Barry Neilson, business development director at Nucleus, said: "Whilst advisers using the Nucleus platform continue to use a wide range of investment solutions, we are seeing a definite increase in the usage of index funds and the role they can play in cost effective and efficient portfolio planning. While some platforms continue to have limited access to index funds, the behaviour of the high-quality advisers that use our platform shows they are more than happy to recommend them should they be made available."

-Ends-

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Notes to editors:

Top 10 largest holdings January 1 2013	
1	Dimensional Global Short Bond Fund
2	Legal & General Index Linked Gilt Index Trust
3	M&G Strategic Corporate Bond
4	Vanguard FTSE UK Equity Index
5	M&G Optimal Income Fund
6	Royal London UK Government Bond
7	Threadneedle UK Equity Income Fund
8	IFDS Prism Cautious Growth Fund A Acc
9	M&G Recovery
10	AXA Framlington UK Select Opportunities

Top 10 largest holdings end Q3	
1	Dimensional Global Short Bond Fund
2	Legal & General Index Linked Gilt Index Trust
3	M&G Strategic Corporate Bond
4	M&G Optimal Income Fund
5	IFDS Prism Cautious Growth Fund A Acc
6	Vanguard FTSE UK Equity Index
7	Royal London UK Government Bond
8	Threadneedle UK Equity Income Fund
9	AXA Framlington UK Select Opportunities
10	Invesco Perpetual Global Bond

About Nucleus

Nucleus Financial Group is an online wrap based business platform.

Nucleus was founded in 2006 by a number of high quality IFAs who shared a commitment to create a market where advisors have the infrastructure and desire to place the client centre stage.

Since foundation Nucleus has established itself as a major force for change in the market. It is now a community of IFA businesses who through ownership and control of the business process seek to create a better customer experience.

The management team is led by David Ferguson chief executive, and offers extensive experience across all areas of the UK retail financial services market.

As at 21 January 2013 assets under administration on the platform were £4.7bn.

<http://www.nucleusfinancial.com/>

