

Press information

10 October 2013

HSBC American Index named fastest growing Q3 fund on Nucleus

Nucleus adviser firms favoured American tracker funds in the third quarter of 2013 as the HSBC American Index became the fastest growing fund on the wrap platform over the period.

Nucleus saw client inflows into the HSBC American Index rise by 694% over the quarter. The £1.06bn* fund, which launched in 1988, aims to provide long term capital growth by investing in companies that make up the S&P 500 index.

The top 10 largest holdings on Nucleus remained largely unchanged over the third quarter, with the only new additions being Fidelity Strategic Bond and BlackRock UK. These replace AXA Framlington UK Select Opportunities and Threadneedle American, both of which were ranked in the top 10 funds by value at the end of Q2.

Top 10 fastest growing funds in Q3	
1	HSBC American Index
2	Blackrock UK
3	Invesco Perpetual Income
4	Henderson European Selected Opportunities
5	JPM Emerging Markets
6	Vanguard FTSE UK Equity Index
7	Fidelity Strategic Bond
8	Fidelity South East Asia
9	Dimensional Global Short Bond
10	Henderson UK Property

Commenting on the data from the third Adrian Murphy, Murphy Wealth, said: “The move out of the US actively managed equity fund would appear to be driven by the comments of Chairman Bernake to congress on the tapering of QE. This is turn has resulted in a rise in bond yields so the move into the Strategic Bond fund looks like diversification play.

“American tracker funds continue to remain popular with advisers reflecting the emerging trends in today’s market. The HSBC American Index fund has outperformed its peer group over a long track record. “

-Ends-

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Notes to editors:

**Source: Trustnet, October 2013*

About Nucleus

Nucleus Financial Group is an online wrap based business platform.

Nucleus was founded in 2006 by a number of high quality advisers who shared a commitment to create a market where advisers 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 adviser 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 1 July 2013, assets under administration on the platform were £5.5bn and the number of member firms was 170.

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