

## PRESS RELEASE

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### Copia launches short duration bond portfolio to draw on 'attractive' yields and meet adviser demand

Copia Capital Management (Copia) has launched a short duration bond portfolio to take advantage of conditions not seen since the Global Financial Crisis and to meet adviser and investor demand for a low risk\*, attractive yield alternative to cash.

The Copia Select: Short Duration Bond Portfolio consists purely of short duration bonds, held primarily in high quality investment grade bond funds. These are supported by satellite holdings in short duration high yield and short duration emerging market debt.

The launch follows recent dislocations in fixed income markets, creating opportunities that have not been available since the Global Financial Crisis. For example, the same pool of bonds available in the Copia Select: Short Duration Bond Portfolio was yielding below 2% as recently as a few months ago but is currently around 7% (as at, 31 October 2022).

**Robert Vaudry, Managing Director of Copia Capital**, said: "The significant sell-off in bonds that will mature over the coming months has created an attractive investment opportunity.

"We had already been introducing a short duration bond fund into several multi-asset portfolios, and advisers liked the idea for their low risk and attractive yield properties.

"The feedback to us was that, if we could launch a pure mandate possessing the same low risk characteristics and attractive yields, their clients would find this appealing."

The strategy is targeted at investors who may be sitting in cash and are concerned about negligible yield but are also nervous, due to geopolitical tensions and the resulting market volatility, about what they see as the increase in risk involved in equity exposure and a traditional multi-asset portfolio. It is anticipated that advisers will use the portfolio to capture a short term yield opportunity for clients holding cash positions, with an eye on returning to a legacy holding once that yield advantage dissipates.

However, the strategy has not been designed as a replacement for multi-asset, but one way to obtain a higher yield in current markets – above that available on cash – without taking excessive risk. The fund has no exposure to equities, alternatives or any complex investments such as derivatives.

\* the profile maps to Dynamic Planner risk profile 3.

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## **NOTES FOR EDITORS**

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### **About Copia**

Copia is the investment solutions division of Novia Financial plc, a UK platform provider with group platform assets in excess of £11.8bn under administration. Novia was launched in 2008 and Copia was launched in 2013.

For more information, see [www.copia-capital.co.uk](http://www.copia-capital.co.uk)

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