

Schroders Launches US Equity Income Maximiser Fund

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Schroders has expanded its Maximiser range with the launch of the Schroder US Equity Income Maximiser Fund.

The fund, which launches today, aims to deliver 5% income per year, paid quarterly, by investing in some of the largest companies in the US. The fund will hold a portfolio of equities which aims to provide an exposure similar to that of the largest US companies weighted by market capitalisation.

As with other funds in the Maximiser range, the fund will add a covered call option overlay to enhance the yield.

The fund will be managed by Schroders' Risk Managed Investments team. Mike Hodgson, Head of Risk Managed Investments & Structuring, will be responsible for managing the portfolio including the call option overlay strategy and will be supported by a team of four dedicated structured investment managers.

Mike has nearly 30 years of experience, while the four managers have a further 53 years of experience between them, with £6.2 billion* in assets under management across the Maximiser range.

James Rainbow, Co-Head of UK Intermediary at Schroders said:

'Schroders' Maximiser strategy has a proven track record in enhancing equity yield in all market conditions.

This is the first time the Maximiser strategy has invested solely in the US market and we are excited to be offering an attractive solution for investors who not only want to invest in large US companies but also require a higher income from their investments. For example, the Maximiser strategy enables us to include those tech stocks which are currently paying little or nothing in the way of dividends and generate this income from them. We have been managing similar strategies covering the UK and international equity markets since 2005 giving us many years of experience and expertise in delivering this income while still providing capital growth potential.'

* As at 28 February 2017

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