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Monday 21st June 2010

**Way Charteris Gold Fund storms to number one spot four months after launch**

THE WAY CHARTERIS Gold Fund has stormed to the top of the mutual fund rankings, beating huge competitors such as Black Rock and Investec gold funds.

Introduced earlier this year (February) by WAY Fund Managers (WFM), the fund is now rated first out of more than 3,000 mutual funds since launch to June 17th.

The fund has grown by 16.92 per cent in that time – its nearest Gold fund rival, managed by Investec, grew to 13.93 per cent in the same period. (source: Financial Express), while Black Rock's Gold & General fund has returned 11.74%.

Fund Manager Ian Williams of WAY Charteris Treasury Portfolio Managers said: "It is a modestly sized fund, which gives us greater flexibility to switch between gold bullion and gold shares to meet our investment targets."

"The fund is far more manoeuvrable than a large fund. This is very important as the underlying shares can often be difficult to deal in," he added.

Crucially, the fund does not have exposure to BP shares – unlike some of its bigger rivals, preferring to invest predominantly in 'blue chip' gold mining companies, as well as smaller mining firms and companies dealing in other commodities, minerals and precious metals.

"By getting to the top of the charts within three months of launching, we've already shown that the Gold Fund can compete with the big players," Williams said.

"But with all eyes on South Africa at the moment for the World Cup, we won't be taking to the same playing field as all the other gold funds out there by investing in the country," he continued.

"We believe that the risks of investing in South Africa heavily outweigh any potential rewards. As far as we're concerned, our performance against other funds has to be viewed in terms of risk adjusted returns not just on straight returns.

"Investors can rest assured that the overall risk of the Gold Fund is reduced even further as we do not use leveraged funds," Williams added.

Much of the fund's exceptional performance can be attributed to Ian Williams, its highly successful manager.

Williams also runs other funds at the top of their game, including a UK top five gilt fund and also a top five equity income fund (over the past three years)

The WAY Charteris Gold Fund is suitable for a range of investment objectives, including inheritance tax mitigation, regular savings plans as well as lump sum investment, and can be held within an ISA wrapper.

Charges & Commission:

Initial 5.25% (3% commission)  
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