

## DECALIA Global Income Fund Awarded Morningstar's Highest 5-Star Rating

DECALIA is delighted to announce that its flagship fixed income strategy, **DECALIA Global Income** (ISIN: LU2088672378), has been awarded **Morningstar's highest rating of 5 stars** in the **Global Diversified Bond category**.

This prestigious rating recognizes the fund's outstanding and consistent performance over the past three years in its institutional share class, underscoring DECALIA's commitment to delivering **strong, risk-adjusted returns**. The fund has **outperformed** the Bloomberg Barclays Global Aggregate USD Unhedged Index **by approximately 3.75% annually over the past three years** (as of October 15, 2024).

Our investment strategy has been shaped by a clear economic outlook since 2022, positioning us to anticipate a "soft landing" with no imminent recession and a



**Fabrizio Quirighetti**  
Chief Investment Officer  
Lead Portfolio Manager

gradual rate normalization by the **Federal Reserve**. Looking ahead, we maintain a **cautiously optimistic view**, expecting moderate growth and manageable inflation, while continuing to seek **selective opportunities** and manage risks across diverse markets.

**Morningstar's 5-star rating** is awarded to only the **top 10% of funds** in each category, based on a **rigorous, risk-adjusted return metric** and requiring at least a three-year track record.

**Fabrizio Quirighetti**, Chief Investment Officer and lead Portfolio Manager, commented: *"Our team is thrilled to receive this recognition from Morningstar. The 5-star rating further confirms that our investment process can compete with, and indeed rival, much larger fixed-income firms."*

He added, *"In a market increasingly dominated by passive strategies, we remain convinced that **active management in fixed income is essential**, allowing us to find **unique opportunities** beyond the reach of larger, passive funds."*

### About DECALIA Global Income Fund

DECALIA Global Income aims to generate a **steady income stream** through a diversified allocation across a broad range of fixed income segments and securities.

The **fund's flexible approach** allows the management team to invest dynamically and in an efficient way across various types of bonds, based on their assessment of economic trends, valuation opportunities and risks.

## Key Features of the DECALIA Global Income Fund

- **Global Reach:** Flexible geographic allocation, with up to 30% exposure to emerging markets, allowing dynamic adjustments to target specific countries, currencies, sectors, capital structures, or maturity buckets as required.
- **Flexible Credit Ratings:** Portfolio includes a broad range of credit ratings—from investment-grade to high-yield and unrated securities—with an expected average rating of Investment Grade.
- **Delivering Superior Risk-Adjusted Returns:** Aiming for 3-5% targeted volatility over a 3-year horizon, below a global aggregate benchmark, with the potential for enhanced returns.

**For any further information about DECALIA Global Income and other DECALIA SA investment solutions, please contact us at [info@decalia.com](mailto:info@decalia.com) or visit [www.decalia.com](http://www.decalia.com)**

## About DECALIA group

Established in Geneva in 2014, DECALIA SA is an investment management company focusing on Wealth Management, Asset Management and Private Markets. With more than 70 employees and assets under management that stand at CHF 5.2 billion, DECALIA has expanded rapidly, in particular thanks to its active-management experience built up over the last 30 years by its founders. Geared to practical solutions, DECALIA is devoted entirely to generating a higher risk-adjusted performance for its clients, while ensuring the highest level of service. The fundamental values that shape its DNA and underpin its actions are dedication, innovation and team spirit. Its investment philosophy is based on several fundamental principles: stringent risk management, capital preservation, an active management style and selection of the best talent. DECALIA is regulated by FINMA through a collective asset manager's licence. In addition to its Geneva headquarter, the group has offices in Zurich and Milan.

## Legal information

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