

Atlant Stability Reaches Five-Star Morningstar Rating

Atlant Fonder's derivatives-assisted fixed-income fund, Atlant Stability, has been upgraded to a five-star rating in Morningstar's grading system, up from four stars last year. With this upgrade, both fixed-income funds in Atlant Fonder's product range now hold a five-star rating.

"We are pleased to announce that Morningstar has raised the rating for Atlant Stability from four to five stars. This means that Stability is one of the highest-rated funds in Sweden within its category," says the team at fund boutique Atlant Fonder. Atlant Stability now holds a five-star rating in the "Fixed Income – SEK Bonds, Corporate" category, where the top 10 percent of funds receive the highest rating. "This also means that both of our fixed-income funds, Atlant Stability and Atlant Högräntefond, now hold five-star ratings," the team adds.

Atlant Stability was launched in early October in 2008 as an absolute return alternative fund with a focus on low risk and capital preservation. The fund remained classified as an alternative fund until 2021, when the team at Atlant Fonder chose to reclassify it into the broader fixed-income category. "As the fund market evolved, we recognized that Stability's strategy and holdings aligned more closely with fixed-income funds, leading to its reclassification in 2021," explains the team. After receiving its first star rating last year upon reaching the three-year milestone as a fixed-income fund, the fund has now earned Morningstar's highest rating. "After three years as a fixed-income fund, we have achieved Morningstar's highest five-star rating," the team adds.

Founded and managed by head portfolio manager Anders Kullberg, with portfolio manager Nikos Georgelis also on the team, Atlant Stability has delivered an annualized return of 3.1 percent since its launch in 2008. This performance has been achieved with an annualized volatility of just 2.5 percent, resulting in a Sharpe ratio exceeding one. Atlant Stability maintained 14 consecutive years of positive returns before experiencing a modest decline of 2.8 percent in 2022. The fund rebounded with a 6.0 percent gain in 2023, followed by an additional 7.2 percent increase in 2024.

Atlant Stability manages SEK 1.5 billion in assets, accounting for 15 percent of Atlant Fonder's total assets under management of SEK 9.7 billion. It is the second-largest fund in the boutique's product lineup, following Atlant Opportunity, which manages SEK 6.85 billion.