

Shelton Tactical Credit Fund Receives Morningstar Rating Of 4 Stars

DENVER, COLORADO, USA, December 9, 2021 /EINPresswire.com/ -- Shelton Capital Management ("Shelton"), a multi-strategy asset manager with more than \$4 billion in assets under management, is pleased to announce that the [Shelton Tactical Credit Fund](#) (DEBIX, DEBIX) received a Morningstar Rating™ of 4 stars among 296 Nontraditional Bond funds, based on risk-adjusted returns as of November 30, 2021.



Our strategy is repeatable throughout the credit and interest rate cycles and provides a compelling solution to the problem of rising rates and market volatility"

Jeffrey Rosenkranz, Portfolio Manager of the Shelton Tactical Credit Fund

"We are proud to receive Morningstar's high rating. Our thoughtful approach to generating income and capital appreciation through tactical allocation and fundamental credit research is producing attractive returns during very difficult times in the fixed income markets," said Jeffrey Rosenkranz, Portfolio Manager of the Shelton Tactical Credit Fund. "We believe the strategy is repeatable throughout the credit and interest rate cycles and provides a compelling solution to the problem of rising rates and market volatility."

Rising rates and inflation can wreak havoc on fixed income portfolios. DEBIX is uniquely positioned to navigate the current challenges in the fixed income markets. The Fund is a differentiated credit-focused fixed income total return strategy that employs credit analysis to identify bonds that are undervalued by the market. According to Morningstar (as of 11/30/21), DEBIX's returns rank in the top 4% of all Nontraditional Bond funds since inception*.

Rosenkranz, with over 25 years of experience investing across the credit markets from investment grade and crossover to high yield, distressed debt and special situations, leads the Fund's management team, which has over 70 years of combined research and trading experience across corporate and municipal credit markets.

About Shelton Capital Management

Shelton Capital Management is a multi-strategy asset manager with fund administration and digital marketing expertise. With a determined focus on growth, Shelton Capital is active in acquisitions and fund consolidations. Shelton Capital Management has expertise in mutual fund and separately managed account advisor mergers and has completed seven transactions with the goal of improving the financial and economic performance of partner firms. Shelton Capital

manages over \$4 billion of assets as of 12/8/21. For additional information, visit <http://sheltoncap.com>.

Important Information

*Inception date: 12/12/13

It is possible to lose money by investing in a fund. Past performance does not guarantee future results. Investors should consider a fund's investment objectives, risks, charges and expenses carefully before investing. The prospectus contains this and other information about a fund. To obtain a prospectus, visit www.sheltoncap.com or call (800) 955-9988. A prospectus should be read carefully before investing. Mutual fund investing involves risk, including possible loss of principal.

Credit-related instruments typically decrease in value when interest rates increase. Concentration in a small number of issuers increases the risk that one issuer could have a large adverse impact on the Fund's return. Borrowing and frequent trading could increase the Fund's operating expenses. High-yield bonds involve greater risk of default, and may be more volatile and less liquid than investment grade securities. Subordinated and unsecured loans may be disproportionately affected by default and downgrade. Foreign investments may be adversely affected by currency fluctuations, lower liquidity, tax regulation, and political instability. Derivatives can be highly illiquid and difficult to unwind.

The Fund's short positions may equal up to 100% of the Fund's net asset value. Short sales theoretically involve unlimited loss potential since the market price of securities sold short may continuously increase.

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Morrison Shafroth

Momentum

+1 7204703653

[email us here](#)

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