20th Thanksgiving for Wallick Investments, LLC

Wallick Investments is now an SEC registered investment advisory firm with over 250 clients, AUM over $124M as of 11/25/2025, and manager of Fidelis 100 Index.

20th Anniversary Celebration October 30, 2025 at historic registered office in Elmwood Park

COLUMBIA, SC, UNITED STATES, November 25, 2025 /EINPresswire.com/ -- June 2025 marked not only the 20th anniversary for Wallick Investments, but also significant milestones for the South Carolina-based money management firm, and they give glory to God this Thanksgiving for their success. Beginning in June of 2005 with less than 20 clients at year end, Wallick Investments is now an SEC registered investment advisory firm with over 250 clients. Assets under management have grown at an annualized rate close to 15% to over $124M as of 11/25/2025. The firm also is now a fund manager of their own investment index, WI Fidelis Multi-cap Multi-factor Index (Fidelis100.com), making their faith and factor-based strategies accessible not only to their clients, but also world wide.

With the evolution of database technology, what started as a factor-based investment strategy that filtered out “conscience troubling” companies with laborious research, has now become a comprehensive faith and factor-based investment methodology. Coding technology automates pages of formula, capturing Wallick Investments’ faith and factor-based strategies for the Fidelis 100 Index, launched March 17, 2022. Licensing Fidelis 100 Index, Inspire Investing launched the Inspire Fidelis ETF (NYSE: FDLS) August 23, 2022. The Fidelis methodology is available to individuals, institutions and other non-affiliated advisors, either through a direct client relationship with Wallick Investments, or through the Inspire Fidelis ETF, whose mandate is to replicate the investment results that generally correspond, before fees and expenses, to the performance of the Fidelis 100 Index. For the Inspire Fidelis ETF prospectus, visit Inspireetf.com/fdls. Please read carefully before investing.

L-r: Wade Stinnette, Tori Matise, Dan Wallick and Susan Wallick

In addition to celebrating 20 years of "laser-focused" investment service, the firm celebrates:

• 3-yr performance for Fidelis 100 Index and the Inspire Fidelis ETF;
• over $100 million in assets invested in FDLS; and
• a 4-star Morningstar RatingTM for Inspire Fidelis ETF*

The firm's strategies include: five asset allocation, two equity, one bond and one tactical. Wallick Investments gives thanks for their clients and the noble mission of faith and factor-based investing.

* 4-star Morningstar RatingTM is for 3 year risk-adjusted performance out of 375 US Mid-Cap Blend funds as of 10/31/25. FDLS, with an annualized 3-year return of 15.01% as of 10/31/25, is a product of Inspire Investing, the world's largest provider of faith-based ETFs with over $2 billion in AUM.

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