

Spotlight Fund of the Month

Quick Facts

JPMorgan Core Bond Fund I (WOBDX)
Morningstar --- ☆☆☆☆☆
Category --- **US Fund Intermediate Core Bond**
Total Assets --- **\$52.92 billion**

J.P.Morgan
ASSET MANAGEMENT

Why We Like This Fund

The JPMorgan Core Bond Fund I (WOBDX) seeks to outperform the Bloomberg US Aggregate Index through an actively managed portfolio of US investment-grade bonds. The strategy employs a fundamental, diversified, and value-driven approach to core bond investing, focusing on high-quality intermediate-term bonds. Bottom-up security selection drives portfolio construction in WOBDX, and a deep understanding of issuer balance sheets and cash flows emphasizes quality throughout the investment process. Leveraging a team of dedicated credit analysts, the experienced management team led by strategy veteran Rick Figuly consistently emphasizes risk management and downside protection. A long-standing bias to agency and non-agency securitized debt of various structures differentiates this strategy from its peers and the benchmark, and acts as a nice complement to the team's strong corporate credit capabilities. The strategy typically manages portfolio duration within a 10% range of benchmark duration. Consistent application of this process has ultimately led to strong absolute and risk-adjusted performance in a variety of market environments. The fund has outpaced both the index and category peers in each of the last 6 years, as well as registered high Sharpe ratios and generated more alpha over trailing 3-, 5-, and 10-year periods.

Where to Use

The JPMorgan Core Bond Fund I (WOBDX) stands apart from peers in the intermediate fixed income space by measured performance, but also by its ability to diversify portfolios. The strategy's correlation to equities is lower than 85% of intermediate core bond funds, and its allocation differs materially and positively from the industry-standard benchmark. Consistent, strong performance and exceptional diversification make this fund an excellent option for any multi-asset portfolio.

What are the Top-Rated Funds Lists?

The Top-Rated Mutual Funds and Exchange Traded Funds (ETF) Lists are resources that feature a list of equity, fixed income, and alternative mutual funds or ETFs that are selected by Osaic Research using proprietary screening criteria and selection methodology. The lists are designed to help you narrow the wide universe of funds available to a more manageable selection of higher-quality funds. Spectrums of asset class categories are covered. In most categories, you will find at least one risk-averse fund option and one option where the focus is geared more toward alpha generation, with the potential for higher volatility.

You can access the Top-Rated Funds Lists by visiting the Market Research page through Vision2020 or by reaching out to Research@Osaic.com.

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The spotlight Mutual Fund of the month reflects the Osaic Investment Research Team’s screening process and does not constitute a personalized recommendation. Financial Professionals should assess suitability based on client investment objectives and risk tolerances and should carefully read the prospectus to consider the investment objectives, risks, charges, and expenses of a fund.

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