



[HOME](#) / [NEWS](#) / [SDL plans Buffettology Smaller Companies investment trust launch](#)

# SDL plans Buffettology Smaller Companies investment trust launch

By [Jessica Tasman-Jones](#), 4 Aug 20

Keith Ashworth-Lord had previously said a global fund launch was in the pipeline



Sanford Deland is planning to add its first investment trust to its small stable of funds that will use the Buffettology branding employed on Keith Ashworth-Lord's fund.

SDL would not comment on the planned launch but filings on Companies House show the Buffettology Smaller Companies Investment Trust was incorporated on 31 July. SDL is listed under "persons with significant control" while its chief executive Alex Brotherston is named as an officer alongside Ashworth-Lord (pictured).

In June 2019, [Ashworth-Lord told Portfolio Adviser](#) that SDL was in talks regarding the licencing of the Buffettology brand for more funds. He said at the time the launch would take place within the next year and would become the third strategy in the SDL stable alongside his flagship £1.3bn SDL Buffettology fund and the £15.2m SDL Free Spirit fund.

Warren Buffett's former daughter-in-law Mary Buffett owns the Buffettology trademark alongside David Clarke, an early shareholder in Berkshire Hathaway.

The Association of Investment Companies said getting an investment trust off the ground can take between three to four months, but that it was also difficult to generalise. The main steps involved in establishing an investment trust include preparing the prospectus, recruiting the board and any pre-marketing.

## NEWSLETTER

Subscribe to Portfolio Adviser: To receive the latest news and analysis tailored to UK wealth managers, sign up for our twice-daily emails

Subscribe

**Gemologist:**  
Can we adapt to the new climate normal?

Federated Hermes International

SPONSORED BY FEDERATED HERMES



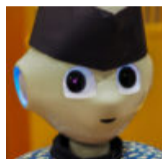
See also: [Sanford Deland reveals Rosemary Banyard replacement on Free Spirit](#)



By [Jessica Tasman-Jones](#), 4 Aug 20

TAGS: [BUFFETTOLOGY](#) | [KEITH ASHWORTH-LORD](#) | [SANFORD DELAND ASSET MANAGEMENT](#)

## ANALYSIS



**SPONSORED BY JP MORGAN**

**JP Morgan Japanese Investment Trust is well placed to reap recovery rewards**

...



**INVESTMENT**

**How high can gold go amid fears of a second wave of coronavirus?**

## RECENT NEWS



**INVESTMENT**

**UK equities cast aside as £11bn flows into funds in second quarter**



**COMPANIES**

**Competition watchdog halts FNZ acquisition**



**COMPANIES**

**Family office falls short after controversial £250m government coronavirus contract**



**EQUITIES**

**James Clunie and Ben Whitmore funds among Jupiter products falling short on value**



**PA ANALYSIS**

**How can advisers survive 140% hikes in regulatory fees?**

## Leave a Reply

You must be [logged in](#) to post a comment.

## MORE NEWS AND ANALYSIS FROM LAST WORD...

**EXPERT INVESTOR**

**FUND SELECTOR ASIA**

**INTERNATIONAL ADVISER**

**ESG CLARITY**

[More news from EI](#)

[More news from FSA](#)

[More news from IA](#)

[More news from ESG Clarity](#)

# PORTFOLIO ADVISER

[Contact](#)

[Register](#)

[Sign in](#)



Bonhill Street, London, England, EC2A 4BX

Portfolio Adviser is a monthly news magazine and daily news web site aimed at wealth managers , investment IFAs and other professional fund pickers and asset allocators in the UK and Channel Islands. No news, articles or content may be reproduced in part or in full without express permission of Portfolio Adviser.