



7th October 2020 for immediate release

TRANSACT TOPS COREDATA SURVEY FOR 11TH CONSECUTIVE YEAR

Transact is the top-rated platform in the CoreData 2020 UK Investment Platform Study. This follows their top rating in the equivalent Investment Trends survey achieved in May 2020. Transact has topped both studies for eleven consecutive years.

Transact has maintained first position in overall adviser satisfaction in the CoreData study, in both the large and overall categories. The study is based on the views of 991 UK advisory professionals during May and June 2020.

In this year's study, Transact topped seven of eight core platform areas including service, support, product and investment range, functionality, reporting capability, retirement advice services, adviser remuneration and came second in one, fees and underlying costs.

Jonathan Gunby, Chief Executive Officer said:

"We are pleased to have been top rated by advisers yet again. This time in CoreData following the earlier success in Investment Trends. We remain focused on serving the needs of advisers and their clients and delivering service excellence in the current challenging environment."

Notes for Editors

Transact has been chosen by 6,100 financial advisers and helps them to manage over £39.7 billion on behalf of more than 189,400 clients (correct as at 30 June 2020).

For further comment please contact:

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