



Caledonia Investments - Update from QuotedData

18th September 2025

Public matters

On 24 June Caledonia Investments (CLDN) hosted a public companies spotlight event, where the managers presented in detail on the company's global portfolio of publicly listed investments. This element of the portfolio has a strategic allocation of between 30% and 40% of [net asset value \(NAV\)](#), currently making up 33%. Around 30 companies are held across two portfolios, with a capital portfolio accounting for 72% of the total and income 28%. The target return is 10% per annum for the capital portfolio and 7% for income.

This note focuses specifically on the public companies strategy, and accompanies our note from April which looked at CLDN's private capital strategy, following a similar spotlight event. The most recent event reassured us about the high quality of the companies held and the robust investment process that determines their selection.

Full Research:

<https://quoteddata.com/research/caledonia-investments-public-matters-qd/>

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50 Gresham Street | London EC2V 7AY

Tel: +44 (0) 20 3691 9430

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