

## Press Release

### CAIS and Solactive Debut Industry-First Index for Non-Traded Private Credit BDCs

7 August 2025

**FRANKFURT AM MAIN – Solactive is pleased to announce its latest collaboration with CAIS Advisors LLC. The newly introduced Solactive CAIS Private Credit BDC Index aims to serve as a transparent and rule-based benchmark, tailored specifically for the wealth channel. This index is the first in a planned series of private market indices, offering advisors a standardized way to measure performance in the rapidly expanding alternative asset market.**

Private credit, particularly through non-traded Business Development Companies (BDCs), continues to gain momentum as demand for alternative investments broadens across the market. According to a recent CAIS-Mercer survey, 66% of financial advisors now favor registered fund structures—such as BDCs, interval funds, or non-traded REITs—over traditional private drawdown vehicles<sup>1</sup>. As the democratization of alternative investments continues, advisors require institutional-grade tools to evaluate these strategies—tools previously unavailable in the private market.

The [Solactive CAIS Private Credit BDC Index](#) tracks the performance of non-traded, perpetual-life BDCs regulated by the U.S. Securities and Exchange Commission (SEC), operating as private credit vehicles. The index targets diversification by adjusting component weights and limiting oversized holdings. Eligible companies must have total net assets of at least \$200 million and a minimum of one SEC reporting period.

The index ticker is CAISCRE (ISIN: DE000SL0Q8F7), and it was officially published on August 6, 2025.

Steffen Scheuble, Chief Executive Officer at Solactive, commented: *"We are excited to introduce this industry-leading private credit BDC index with CAIS and look forward to strengthening our partnership with upcoming indices. This benchmark offers a much-needed transparent, rules-based tool for advisors navigating an increasingly complex alternative investment landscape."*

*"Advisor demand for registered products continues to grow, but until now, advisors have often relied on fragmented benchmarking and data analytics when analyzing private market allocations," said Neil Blundell, Chief Investment Officer at CAIS Advisors. "We partnered with Solactive, a leading index provider and recognized innovator, because of our shared vision for solving this gap in the market. This index series seeks*

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*to deliver transparent, reliable benchmarks that allow advisors to better evaluate, track, and compare private market allocations."*

*<sup>1</sup>Source: <https://www.caisgroup.com/our-company/press/new-cais-mercator-survey-reveals-widespread-adoption-of-alternative-investments-among-financial-advisors>*

For more information, please visit:

<http://www.solactive.com>

Note to editors

## About Solactive

Solactive is a leading provider of indexing, benchmarking, and calculation solutions for the global investment and trading community. Headquartered in Frankfurt and, with offices in Hong Kong, Toronto, Berlin, Dresden, and Amsterdam, we innovate and disrupt the status quo as the partner of choice for our clients.

The unique blend of our 350 staff's expertise in data, data science, financial markets, and technology enables our clients' continued success through the delivery of a superior experience, unique customization capabilities, and the best value for money available in the industry. With more than 30,000 indices calculated daily, we offer a full suite of solutions, including market-leading ESG and thematic indices.

As at January 2024, Solactive served approximately 500 clients across the world, with approximately US\$300 billion invested in products linked to our indices. Solactive is registered with ESMA as a benchmark administrator and is supervised by the BaFin.

## Disclaimer

The information in this document does not constitute tax, legal or investment advice and is not intended as a recommendation for buying or selling securities. Solactive AG and all other companies mentioned in this document are not responsible for the consequences of reliance upon any opinion or statement contained herein or for any omission.

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