

PRESS RELEASE

Algebris Investments launches Sustainable World strategy to invest in companies tackling resource scarcity

London, 3rd November 2022 – Global asset manager Algebris Investments today announced the launch of the “Algebris Sustainable World Fund” (the “Fund”). **Simone Ragazzi**, Portfolio Manager, and **Silvia Merler**, Head of ESG & Policy Research, will oversee the fund, leading a team of three dedicated analysts.

As we face living in a world with increasing resource scarcity, reshaping economic activity towards sustainable development has become crucial. This means ensuring that humanity can fulfil minimum social needs – people can access food, water, healthcare, housing, education, and energy – while doing so in a way that maintains Earth’s life-supporting systems.

The new Fund has a sustainable investment objective to make a positive impact on environmental sustainability and social standards. It is labelled as Article 9 under the EU’s Sustainable Finance Disclosure Regulation (SFDR). The Fund will invest globally in equity securities issued by listed companies that contribute positively to the UN Sustainable Development Goals, have a low environmental footprint and support a sustainable planet.

The Fund will adopt a fundamental bottom-up approach and best-in-class ESG assessment when determining which companies to invest in. The Fund’s currency exposure is systematically hedged via the Fund’s base currency (Euro).

Silvia Merler, Head of ESG & Policy Research, comments:

“Unsustainable use of our planet’s resources means they will become ever scarcer unless we act globally. This strategy enables investors to access a wide opportunity set across several areas critical for sustainable development and builds on Algebris’ long-standing commitment to ESG investment. We are delighted to expand our suite of sustainability products for clients seeking to invest in companies worldwide without compromising the health of our planet.”

Simone Ragazzi, Portfolio Manager of the Algebris World Sustainable Fund, further comments:

“The Algebris Sustainable World Fund will invest across geographies and market sectors to deliver long-term, consistent returns. Drawing on the expertise of our strong ESG teams, the strategy will invest in companies with products and services that contribute to improving both environmental and social needs. In this way, Algebris can provide investors with a unique approach to tackling the global challenge of scarcity.”

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Note to Editors

Algebris Investments

Algebris Investments is an independent global asset manager founded by Davide Serra in 2006.

The firm has a historical specialisation in the global financial sector, across equity and credit, and has broadened its expertise to global credit and Italian equity. With respect to private strategies, Algebris invests in distressed credit secured by high-end, residential real estate assets in Italy. In 2021, Algebris launched a new business unit in Milan dedicated to investments in the transition towards a greener and more sustainable economy.



Algebris manages around €16 billion of assets as of 30 September 2022. The firm maintains offices in London, Milan, Rome, Zurich, Dublin, Luxembourg, Boston, Singapore, and Tokyo. The Algebris team consists of over 160 professionals globally.

For further information, please contact:

algebris@edelmansmithfield.com

***This is a marketing communication.** Please refer to the prospectus of the UCITS and to the KIID before making any final investment decisions. Investing in the fund concerns the acquisition of units or shares of the fund itself and not of a specific underlying asset such as building or shares in a company. The decision to invest in the fund should take into account all the characteristics and objectives of the fund as described in its prospectus. More information on the fund sustainability-related aspects is available at <https://www.algebris.com/esg/>. You should consult your tax, legal, accounting or other advisors before making any investment decision.*