



UNION BANCAIRE PRIVÉE

Press release

UBP strengthens its equity investment capabilities with the launch of its Multifunds Secular Trends strategy

Geneva, 25 July 2019

Union Bancaire Privée (UBP) has announced today a new addition to its equity product range with the launch of a Multifunds Secular Trends strategy, an innovative investment solution that combines thematic investing with a long-term view.

This long-only strategy will consist of investing in a concentrated portfolio of 10 to 20 high-conviction thematic equity UCITS funds, with exposure to four key trends that are reshaping society and the global economy: climate change, demographics, consumption patterns and disruptive innovation. The strategy is based on the conviction that these trends will continue to create favourable conditions for leading companies that are able to develop and adapt, and it will provide an innovative investment opportunity for active investors.

The strategy will be managed by UBP's Multi-Management & Fund Research team. Didier Chan-Voc-Chun, head of the team, said: "No single organisation has the resources and expertise to outperform consistently in every market, across all trends and thematic. In a world where disruptive innovation is blurring the lines between countries, sectors, and industries, thematic investments are emerging as an ideal tool for UBP's clients. One of our key attributes is our third-party fund selection team, and open architecture lies at the heart of our solution offering." The transparency, consistency and asset capacity of our third-party fund partners, along with alignment of interests and viable business models will be key criteria for manager selection.

Not only is the portfolio strengthened by its diversification, it also incorporates Environmental, Social and Governance (ESG) factors that offer attractive long-term attributes such as engagement and sustainability. In identifying a wide range of themes across the four interconnected, long-term trends, including resource efficiency, clean energy, ageing populations, millennials, urbanisation, digitalisation, healthcare innovation and water supply, the portfolio's performance is future-proof.

Commenting on the launch, Nicolas Faller, Co-CEO of Asset Management at UBP, added: "Innovation requires asset managers to make courageous decisions, for example, offering and reshaping innovative solutions in the thematic space. This strategy underlines UBP's core values and commitment to responsible investing. As a family-owned, private bank, investing for the future and for upcoming generations is central to our planning and development."

This is the latest move in an ongoing process to develop UBP's responsible investment philosophy. In recent years, UBP has implemented a Responsible Investment policy and rolled out ESG requirements across its private banking and asset management offering. As part of its ongoing commitment to responsible investing, UBP has been a signatory of the United Nations Principles for Responsible Investment (UN PRI) since 2012. More recently, the Bank joined the University of Cambridge Institute for Sustainability Leadership's 'Investment Leaders Group', a select network of pension funds, insurers and asset managers committed to advancing the practice of responsible investing.

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About Union Bancaire Privée (UBP) – www.ubp.com

UBP is one of Switzerland's leading private banks, and is among the best-capitalised, with a Tier 1 capital ratio of 26.1% as at 30 June 2019. The Bank is specialised in the field of wealth management for both private and institutional clients. It is based in Geneva and employs 1,772 people in over twenty locations worldwide; it held CHF 134.4 billion in assets under management as at 30 June 2019.