

Date 13.06.2022

Ethius Global Impact UCITS Fund: Beyond Performance



Ethius Invest Switzerland is an ethically sustainable asset manager from Lucerne, Switzerland and fund initiator of the Ethius Global Impact fund. The company was founded in 2018 as a sustainable and value-oriented asset management company in Lucerne. The company was set up by responsible investors with the aim of driving a sustainable change in the financial industry and achieving attractive returns for its clients on the market. The investment philosophy pursues the principle of a consistent sustainability approach, and the investment methodology is represented by the successful Global Challenges Index. The claim to sustainability is not a supplement, but the basic idea of the company. The company is owner-managed, not obligated to any financial group and is co-invested in its own fund. As a social enterprise, 15 percent of revenue are systematically allocated for in socially and ecologically motivated projects. The Ethius Foundation at the Arco Foundation integrates a positive social impact as part of the business model and makes an active contribution to reducing the SDG Financing gap.

Strategies / Funds in the focus

The Ethius Global Impact Fund is a German mutual fund (UCITS) and has been launched in accordance with Article 9 of the EU Sustainable Finance Disclosure Regulation (SFDR).

By investing in listed companies and carrying out active engagements with all portfolio companies, sustainable change within established structures is accompanied. Through the fund partners and an interdisciplinary expert advisory Board, new standards in the ethically sustainable investment segment are successfully implemented in the following three areas of impact: 1. Consistently sustainable company selection (through the successful Global Challenges Index), 2. Active interaction with the most important stakeholders of the portfolio companies (e.g. also via involvement in the institutional pan-European investor network "Shareholders for Change") as well as active exercise of voting rights during annual general meetings and 3. Direct support of selected projects by a % share of the Fund's ongoing administrative remuneration.

The investment objectives have been defined as the long-term financial outperformance of the MSCI World Net Total Return Index (EUR) and the linking of aspects of financial profitability and sustainable social-ecological impact objectives. At the end of November 2021, the fund was awarded 3 stars of the FNG seal 2022 in the highest category. It has the European SRI Transparency Code and the FNG sustainability profile.

Ethius Global Impact EUR Inst ACC - DE000A2QCX03



The performance figures displayed above relate to the past and past performance should not be seen as an indication of future returns.

<https://www.ethius-invest.ch/> / <https://www.ethius.fund>

In case of any questions please do not hesitate to contact us!



Mr. Michael König
Senior Officer | Head of Fund Partner Network

phone: +352 27 07 31-612
michael.koenig@ifsam.lu