



INFORMED PORTFOLIO MANAGEMENT

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IPM Informed Portfolio Management launches the IPM RAFI® Emerging Markets Fund

A new Emerging Markets Fund using the Fundamental Index® methodology has been launched by IPM Informed Portfolio Management (IPM).

Available with both institutional and retail share classes, the Fund is part of the IPM Fundamental Umbrella Fund, a Luxembourg based UCITS III Fund (SICAV). As is the case with all IPM Funds, the IPM RAFI (Research Affiliates Fundamental Index) Emerging Markets Fund is screened for ESG compliance.

Commenting on the launch of the fund, Jonas Rinné, Chief Executive Officer of IPM, said:

"IPM is the established market leader in implementing Fundamental Index solutions for European institutional investors. The IPM RAFI Emerging Markets Fund is the result of overwhelming demand for an Emerging Markets platform employing the RAFI strategy, and already has €50m in assets."

The Fundamental Index methodology is a unique approach to portfolio construction, in which index weights are determined by fundamental measures of company size (sales, cash-flow, dividend and book value) instead of being based on price and valuation.

Capitalisation weighted indices overweight all overvalued securities and underweight all undervalued securities. The RAFI approach avoids this problem, while retaining the benefits of index investing: full market representation, diversification, large capacity, high liquidity and low turnover. RAFI indices have outperformed their capitalisation-weighted counterparts by over 200 basis points per annum on average over time, and significantly more as one extends the investment universe to include less 'efficient' markets, such as emerging markets. Enhanced RAFI further improves the methodology, adding measurable value through systematic accounting screening and active re-weighting.

Through a co-operation with Swedish based GES Investment Services, IPM RAFI Funds are screened for compliance with international conventions and guidelines on environment, human rights and business ethics.

The new RAFI Emerging Markets Fund trades daily, with NAV-reports published via Bloomberg, Reuters, Morningstar and Telekurs. Available regional/country funds in the IPM Fundamental Umbrella Fund are: RAFI Global, RAFI Global GBP, RAFI US, RAFI Europe, RAFI Japan and RAFI Emerging Markets. Other regions can be created upon client request.

About IPM

IPM is an investment manager offering diversified solutions to institutional investors. Assets under management currently exceed USD 8 billion for over 50 of Europe's most sophisticated pension funds, sovereign funds and other institutional clients in GTAA, Currency Management, and Equity Management strategies.

For further information please refer to www.ipm.se

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