

Banque Hottinguer has selected RBA from the iM Global Partner network, to launch ETF-based asset allocation fund

Paris - October 7, 2024.

iM Global Partner (iMGP) has announced that Banque Hottinguer has selected its New York-based Partner, Richard Bernstein Advisors (RBA), to manage an asset allocation fund based on its main strategy, which has been in place for 15 years.

Richard Bernstein Advisors is a renowned asset allocation specialist. It combines top-down, macroeconomic analysis with quantitatively driven portfolio construction, leveraging ETFs to express its views.

The launch demonstrates the interest from international investors for RBA's solutions through sub-advisory as well as iM Global Partner's ability to create a strategy that reflects European investors' allocation needs.

The fund was exclusively designed by RBA and iM Global Partner for Banque Hottinguer and the specific needs of its private and institutional investors. The multi-asset portfolio is made up of ETFs with exposure to global equities, euro-denominated bonds and a marginal portion of commodities.

RBA seeks to generate alpha by uncovering global investment styles and themes where they believe there are disparities between fundamentals and sentiment. This is very different from the traditional, bottom-up approach that seeks to generate alpha through individual security selection.

The company was founded by Richard Bernstein, the former Chief Investment Strategist at Merrill Lynch & Co and a recognized expert in equity, style and asset allocation with more than 40 years of experience on Wall Street.

Many of the highly experienced investment team have worked with Richard since his time at Merrill Lynch & Co.

Laurent Deydier, Deputy CEO at Banque Hottinguer, said: "This partnership with iM Global Partner and RBA enables us to offer our clients unique access to international management with a US center of gravity. This solution, based on a Pactive® investment approach (active management of passive investment vehicles, ETFs), relies on a combination of macroeconomic and earnings cycle analysis that has proven its strengths and performance across cycles."

Richard Bernstein, CEO and CIO of RBA said: “We are particularly honored to be selected by Banque Hottinguer, a renowned historical institution, for the design of this new product. This materializes our partnership with iM Global Partner and strengthens our presence in the European market as an expert in asset allocation.”

Julien Froger, Managing Director - International Distribution, said: “We are thrilled to work with Banque Hottinguer on this project and believe it demonstrates our ability to develop new strategic partnerships and innovate through new investment solutions.”

About Banque Hottinguer

Founded in 1786, Banque Hottinguer is an independent French bank with three core businesses: private banking, asset management and corporate finance.

Banque Hottinguer advises its private clients, including business owners, on building up, managing and passing on their wealth, and its corporate clients and private equity funds on mergers & acquisitions, fundraising and financing. Its support is based on a resolutely entrepreneurial approach and an intimate knowledge of the world of entrepreneurs. At December 31, 2022, Banque Hottinguer, with a staff of almost 100, had over €3.2 billion in assets under management.

About RBA

Richard Bernstein Advisors LLC is a leading global macro multi-asset investment manager with a broad range of products across global equity and fixed-income markets. Founded in 2009, RBA manages approximately US\$15.2 billion (as of 31 July 2024) in client assets, including several prominent pension plans, corporations and foundations, as well as financial advisors and high-net-worth individuals. RBA's investment insights as well as further information about the firm and products can be found at: www.rbadvisors.com.

About iM Global Partner

iM Global Partner is an asset manager with a difference. We are a dynamic network of specialist boutique investment managers, delivering best-in-class solutions, across asset classes, to our discerning Institutional and Professional Investors across the globe. We are proud to call these businesses our Partners and they are the essence of what iM Global Partner stands for: uncovering what we believe to be the best, the very best investment talent. We had around USD \$45 billion assets under management as of end August 2024.

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