



## **OYSTER Sustainable Europe obtains the highest SFDR ranking**

**Paris, March 23, 2021.** The OYSTER Sustainable Europe fund from iM Global Partner is now classified as an Article 9 fund, the best possible classification under the European Union's new Sustainable Finance Disclosure Regulations.

The EU's Sustainable Finance Disclosure Regulation (SFDR) legislation, in place since March 10, was created to increase transparency in how asset managers integrate sustainability risks and opportunities into their investment decisions and recommendations.

Article 9 funds are those which have sustainable investment as their objective and must meet the highest standards defined by the regulation.

The OYSTER Sustainable Europe fund is managed by Zadig Asset Management. Zadig is a signatory of the UN Principles for Responsible Investment and the fund has been awarded the French SRI label.

Zadig Asset Management believes that Environmental, Social and Governance (ESG) considerations allow for long-term value creation and lower risks, while fostering positive change. The company uses a proprietary approach to seek a deep understanding of each company and their products or services to see how they are contributing to making the world a better place. It targets 'sustainability at a reasonable price' and uses hard data in its research to avoid the risk of greenwashing.

Rather than investing only in 'best in class' sustainable businesses, Zadig AM looks for recognized sustainable companies that trade at a discount due to temporary uncertainties or transitioning companies that have been overlooked but can become more sustainable over time.

**Pierre Philippon, director of Zadig Asset Management,** said: "After obtaining the SRI Label in November 2020, the classification of the OYSTER Sustainable Europe strategy under article 9 of SFDR regulations confirms our commitment to a clear and transparent Socially Responsible Investment framework.

"We're using Zadig's 15-year-old investment playbook to make sure that our focus on Sustainability doesn't come with excessive risk for our clients, including Sustainability related ones. This approach helped us outperform the market in 2020 despite the severe swings seen between the first and second half of the year."

**Philippe Uzan, CIO Asset Management of iM Global Partner,** said: "With its Sustainability at a reasonable price philosophy, the OYSTER Sustainable Europe portfolio invests in companies that contribute to the UN's Sustainable Development Goals, balanced between Cyclical, Defensive and Growth themes. It is therefore primarily designed to generate financial outperformance as well as to provide positive extra-financial exposure."

### **About iM Global Partner**

iM Global Partner is a worldwide asset management network. It selects and builds long-term partnerships with talented and independent asset management companies through direct capital ownership. iM Global Partner is present in 11 locations across Europe and the United States and provides its clients with access to the best management strategies of its Partners. iM Global Partner's wide range of investment solutions includes the OYSTER range, a Luxembourg SICAV, but also Mutual Funds and ETFs dedicated to US investors. The addition of Litman Gregory, a nationally recognized US wealth and asset management firm, which should be completed in May/June 2021 subject to the SEC approval, will increase dramatically the group's US operations. iM Global Partner represents over US\$20 billion of assets under management as at February 2021.

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### **About Zadig Asset Management**

Zadig Asset Management is a leading European investment firm that applies rigorous valuation and governance criteria, underpinned by ESG principles, to active, concentrated equity investing. It runs UCITS funds and managed accounts for institutional investors seeking high conviction investment ideas to deliver performance. The firm manages \$2bn for institutional investor, private bank and family office clients in Europe and the US.

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