



## **CPR AM LAUNCHES 'SMART TRENDS': CAPTURING THE UPSIDE OF THEMATIC EQUITIES THROUGH A DEFENSIVE PROFILE**

***Smart Trends will invest in CPR AM's thematic equity funds within a low risk multi-asset framework***

- *A thematic equity product with a defensive profile fitted to current environment of durably low yields*
- *Responsible investing: the fund will invest at least 50% of its assets in ESG investment vehicles, in all asset classes*

Paris and London, 04 November 2019 – CPR Asset Management, the thematic centre of expertise of Amundi, has launched 'Smart Trends', a new fund that seeks to benefit from the long-term growth offered by thematic equities within a cautious and flexible multi-asset framework. Exclusion criteria will be applied in order to align the portfolio with a responsible investment strategy. The fund will be managed by Jean-Marie Debeaumarché and Mohamed Dohni, both global multi-asset portfolio managers, in close collaboration with the thematic equity management team.

'Smart Trends' will have a fixed 35% investment into in-house thematic funds, which represent the full spectrum of CPR AM's investment themes including ageing populations, education, climate action, disruption, the food value chain, etc. Every month the thematic equity team will select the best ideas for the coming months and will decide on the funds' weighting.

The multi-asset team will routinely perform an analysis of the market and macroeconomic environment, and on that basis the fund will have the flexibility to modify the equity exposure up to a maximum of 35% through overlay strategies in order to mitigate the portfolio's risk level. The rest of the fund will be exposed to fixed income and cash.

### ***Megatrends as long-term growth opportunities***

The Fund's thematic approach concentrates on those long-term phenomena which offer higher sustainable growth profiles. CPR AM has identified the four major forces reshaping the world as: demographic and social changes, economic shifts, the technological revolution and environmental challenges.

### ***A multi-layer control of risk***

Along with its unique risk-orientated approach and enhanced flexibility to navigate through market cycles, the fund has in place strong risk controls at multiple levels, combining long-term strategic exposure with short/medium-term tactical exposure.

## Responsible investing

Sustainability is embedded in the fund as it is already the case for other thematic and multi-asset funds. ESG filters and SRI criteria ensure the fund offers investors a responsible investment strategy, by investing at least 50% of its assets in vehicles that are deemed responsible.

**Gilles Cutaya, Deputy CEO, commented:** *"With 'Smart Trends' we are bringing together two areas of expertise that have been an integral part of CPR AM's investment DNA: thematic equities and multi-asset. We will offer savers a solution that combines the long-term performance drivers of megatrends with a defensive profile. This fund is a perfect example of CPR AM's complementary expertise in ESG, thematic equities and multi-asset investing."*

ENDS

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### **About CPR Asset Management:**

CPR AM is an investment management company certified by the French Financial Markets Authority, an autonomous and wholly owned subsidiary of Amundi Group. CPR AM works exclusively in third-party investment management (for institutional, corporate, insurance, private banking, fund management, and wealth management clients). CPR AM covers the main asset classes, including equities, convertibles, diversified investments, interest rates and credit).

CPR AM in figures: (End-June 2019)

- €50 billion in assets under management
- More than 100 employees, of which a third are involved in investment management

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### **About Amundi:**

Amundi is Europe's largest asset manager by assets under management and ranks in the top 10<sup>1</sup> globally. It manages more than 1.487 trillion<sup>2</sup> euros of assets across six main investment hubs<sup>3</sup>. Amundi offers its clients in Europe, Asia-Pacific, the Middle East and the Americas a wealth of market expertise and a full range of capabilities across the active, passive and real assets investment universes. Clients also have access to a complete set of services and tools. Headquartered in Paris, Amundi is listed since November 2015.

Thanks to its unique research capabilities and the skills of close to 4,500 team members and market experts based in 37 countries, Amundi provides retail, institutional and corporate clients with innovative investment strategies and solutions tailored to their needs, targeted outcomes and risk profiles.

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<sup>1</sup> Source IPE "Top 400 asset managers" published in June 2019 and based on AUM as of end December 2018

<sup>2</sup> Amundi figures as of June 30<sup>th</sup>, 2019

<sup>3</sup> Investment hubs: Boston, Dublin, London, Milan, Paris and Tokyo