



IFM Investors (UK) Ltd

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Teamgröße: über 300 Mitarbeiter
(institutioneller Bereich)

Ansprechpartner für das institutionelle Geschäft:

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Unternehmensüberblick/Kurzbeschreibung:

IFM Investors is one of the few truly aligned global fund managers in the world, with over EUR65.6 billion in assets under management (as at 31 December 2017) across infrastructure, debt investments, listed equities and private equity.

The company was established by Australian pension funds over 23 years ago to challenge the traditional profit-driven investment management model. Our overriding objective is to build scale, and share the benefits of that scale amongst both owners and external investors in the form of fee reductions (as we have done twice in recent years).

Outside of Australia, IFM is focused on infrastructure equity (pooled funds) and infrastructure debt (mandates), currently managing EUR32 billion. We have a sizeable presence in Europe with teams in London and Berlin who help manage capital on behalf of over 50 European institutional investors (including from Switzerland and Germany).

IFM is a responsible investor and has been a signatory to the United Nations supported Principles for Responsible Investment since 2008.

Im deutschsprachigen Markt aktiv seit: 2010

Mitgliedschaften in Verbänden:

☐ BVI ☐ BAI ☐ EFAMA

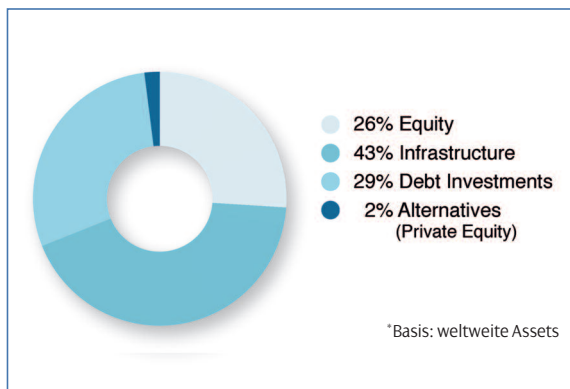
☒ Andere: Principles for Responsible Investment; Investor Group on Climate Change; ESG Research Australia; Australian Council of Superannuation Investors.

Assets under Management in Zahlen (in Mio. Euro):

65.600 AuM weltweit
3.142 AuM europäische Kunden
67 AuM deutsche Kunden
67 AuM institutionelle Kunden Deutschland

(Daten zum 31. Dezember 2017)

Assets under Management nach Assetklassen* (in %):



Angebotene Investmentvehikel:

- ☐ Spezialfonds/Segmentfonds
- ☐ Publikumsfonds (OGAW/UCITS)
- ☐ Strukturen/Zertifikate
- ☐ Closed-End-Funds
- ☒ Andere: Segregated Accounts, Open-Ended Funds

Services:

- ☐ Advisory/Sub-Advisory
- ☐ Master-KAG/KVG
- ☐ Depotbank Operations
- ☐ Asset Allocation (SAA/TAA/GTAA)
- ☐ Research
- ☐ KAG/KVG
- ☐ Liability Management
- ☐ Risk Management
- ☒ Andere: Institutional Investment Management

Performancemessung/-verifizierung:

- ☒ Intern ☒ Extern: Auditors

Bemerkung: IFM Investors is compliant with the Australian Financial Services Council performance standards as well as relevant accounting, tax and regulatory standards. Our external auditor, Deloitte, audits investment performance annually. Investment performance is also subject to regular internal audit.

Angebotene Assetklassen:

1. Bonds

| Style | Regionen | Global | Europe | Germany | US | Japan | Asia, Pacific | Emerging Markets | Andere |
|--------------------------------|----------|--------|--------|---------|----|-------|---------------|------------------|--------|
| Staatsanleihen | | - | - | - | - | - | - | - | - |
| Corporate Bonds | | - | - | - | - | - | - | - | - |
| High Yield | | - | - | - | - | - | - | - | - |
| Inflation Linked Bonds | | - | - | - | - | - | - | - | - |
| Convertible Bonds | | - | - | - | - | - | - | - | - |
| ABS/MBS | | - | - | - | - | - | - | - | - |
| Senior Loans | | - | - | - | - | - | - | - | - |
| Absolute Return | | - | - | - | - | - | - | - | - |
| Strukturierte Produkte | | - | - | - | - | - | - | - | - |
| SRI | | - | - | - | - | - | - | - | - |
| Andere: Infrastructure debt | | X | X | X | X | - | - | - | X |

2. Real Assets/Infrastructure

| Assetklasse | Infra-structure | Private Equity | Renew-ables | Commodities | Andere |
|-------------|---|----------------|-------------|-------------|--------|
| Global | X (IFM Global Infrastructure Fund) | - | - | - | - |
| Australia | X (IFM Australian Infrastructure Fund) | - | - | - | - |

Erläuterung zu den angegebenen Produkten: Infrastructure

IFM Investors is a pioneer and leader in infrastructure investing on behalf of institutional investors globally, with a >23 year track record. We manage EUR28 billion in infrastructure equity on behalf of more than 240 investors, investing together in this long-term asset class. Our Global Infrastructure Fund and Australian Infrastructure Fund are open-ended vehicles that carefully target assets with strong market positions, high barriers to entry, limited demand elasticity and long lives.

Debt Investments

IFM is a specialist infrastructure debt, credit, currency and cash manager, with an 18-year track record. Outside of Australia, IFM is focused on infrastructure debt where we manage EUR4 billion of assets across the credit spectrum. Our investor base are attracted to the asset class as, in addition to asset diversification, some investments can offer a relative premium over comparable corporate credit with more defensive characteristics (lower default risk and higher recovery rate).

Erläuterungen zu Research und Investmentprozess:

IFM Investors' primary focus is to deliver superior long-term net performance through quality portfolios that have a strong risk focus. We aim to ensure that fees are fairly priced across our global product range and seek out investments that stack up on a risk-return basis.

IFM's infrastructure investment philosophy is based around a rigorous investment process developed and refined over the course of our 20+ years' experience investing in infrastructure. Our process is supported by a sophisticated and proprietary portfolio construction methodology known as InFRAME™ which relies upon a bottom-up analysis of infrastructure revenues and recognises the variety of risk characteristics that occur within infrastructure sub-sectors.

A professionally managed portfolio of infrastructure investments aims to deliver institutional investors significant benefits, including strong risk-adjusted performance, uncorrelated returns, inflation linkage, a robust cash yield and portfolio diversification.

Welche Projekte stehen 2018 im Vordergrund:

IFM Investors remains focused on continuing to grow and diversify our existing infrastructure products, albeit deployment discipline remains at the forefront of our mind in the current environment. We are confident that the supply of investment opportunities will continue going forward, and consequently are actively raising funds from new and existing investors.

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