



IFM Investors (Switzerland) GmbH

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Website: www.ifminvestors.com

Teamgröße: über 300 Mitarbeiter
(institutioneller Bereich),
davon 3 im deutschsprachigen Raum

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 more than €73.8 billion in assets under management (as at 30 November 2018) across infrastructure, debt investments, listed equities and private equity.

Along with our owners – 27 pension funds – and other like-minded investors, we believe in the power of bold, long-term and sustainable investment commitments and strategies that aim to deliver results, which ultimately enhance people's retirement outcomes.

Established more than 20 years ago, we invest on behalf of 337 like-minded institutions globally, including pension funds, sovereign wealth funds, insurers, endowments, foundations and universities.

With offices located in London, Berlin, Zurich, New York, Tokyo, Seoul, Hong Kong, Sydney and the head-office in Melbourne, Australia, IFM Investors has one singular purpose – the prosperity of investors and their members.

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:

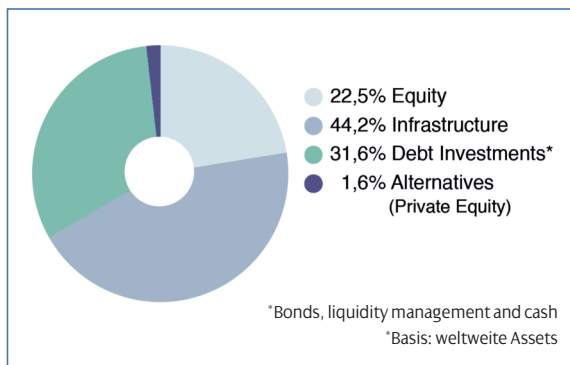
- BVI BAI EFAMA
- Andere: Principles for Responsible Investment, 30% Club, Investor Group on Climate Change, Carbon Disclosure Project, Climate Action 100+, Ceres Investor Network, ESG Research Australia, Sustainability Accounting Standards Board, and the Australian Council of Superannuation Investors.

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

73.810 AuM weltweit
4.059 AuM europäische Kunden
200 AuM deutsche Kunden
200 AuM institutionelle Kunden Deutschland

(Daten zum 30. November 2018)

Assets under Management nach Assetklassen* (in %):



Angebote Investmentvehikel:

- Spezialfonds/Segmentfonds
 Publikumsfonds (OGAW/UCITS)
 Strukturen/Zertifikate
 Closed-End-Funds
 Andere: Segregated Accounts

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

Remark: IFM Investors is compliant with the Australian Financial Services Council performance standards as well as relevant accounting, tax and regulatory standards. We do not claim compliance with Global Investment Performance Standards. Our external auditor, Deloitte, audits investment performance annually. This audit monitors compliance with relevant accounting, tax and regulatory standards. Investment performance is also subject to regular internal audit.

Angebotene Assetklassen:

1. Equity

Style	Regionen	Global	Europe	Germany	US	Japan	Asia, Pacific	Emerging Markets	Andere
Aktiv / Passiv (auch ETFs)		-/X	-/-	-/-	-/-	-/-	X/-	-/-	X/X
Quantitativ/Qualitativ		X/-	-/-	-/-	-/-	-/-	X/-	-/-	X/X
Small Cap		-/X	-/-	-/-	-/-	-/-	-/X	-/-	X/X
Large Cap									
Growth/Value		-/-	-/-	-/-	-/-	-/-	-/-	-/-	-/-
Bottom-up/Top-down		-/-	-/-	-/-	-/-	-/-	-/-	-/-	-/-
Long-only/Long-short (z.B. 130/30)		X/-	-/-	-/-	-/-	-/-	-/X	-/-	X/X
Absolute / Relative Return		-/X	-/-	-/-	-/-	-/-	X/-	-/-	-/X
High Income bzw. Dividend / Low Vola		-/-	-/-	-/-	-/-	-/-	-/-	-/-	-/-
SRI		-	-	-	-	-	-	-	-

2. Bonds

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

Erläuterung zu den angegebenen Produkten:

Infrastructure

IFM is a pioneer and leader in infrastructure investing on behalf of institutional investors globally, with a 20+ year track record of success. We manage EUR 32.7 billion in infrastructure on behalf of more than 300 investors, investing together in this long-term asset class. Our Global Infrastructure Fund and Australian Infrastructure Fund are open-ended vehicles that carefully target core assets with strong market positions, high barriers to entry, limited demand elasticity and long lives.

Debt Investments

IFM is a specialist infrastructure debt, credit, bond, currency and cash manager, with a 19-year track record of success. We manage EUR 23.4 billion of debt investments globally on behalf of long-term, institutional investors. Given our global reach, scale and reputation, we are a preferred partner for credit issuers, giving investors access to debt investments globally.

Listed Equities

IFM offers an extensive range of indexed, active and smart beta listed equity options globally. IFM's track record dates back to 1996 and the firm has EUR 16.6 billion under management.

Private Equity

IFM has been investing in private equity since 1998 and currently manages EUR 1.2 billion. IFM's approach is based on a core belief that as an engaged provider of patient long-term capital, the firm can consistently deliver strong relative and absolute returns.

3. Real Assets

Assetklasse	Infra-structure	Private Equity	Renew-ables	Commo-dities	Andere
Global	X (IFM Global Infrastruc-ture Fund)	X (funds)	-	-	-
Australia	X (IFM Australi-an Infrastruc-ture Fund)	X (funds and man-dates)	-	-	-

Erläuterungen zu Research/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 we seek investments that make sense on a risk-return basis for like-minded investors.

IFM's infrastructure investment philosophy is based around a rigorous investment process developed and refined over the course of our 20+ years of 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. IFM Investors has strong relationships with corporations, governments, co-investors and advisers globally, enabling us to source and review a steady stream of opportunities.

Welche Projekte stehen 2019 im Vordergrund:

IFM Investors will continue work with aligned institutional investors in EMEA, the Americas and APAC to tailor investment solutions best suited to their needs. These investors will largely comprise pension funds, non-pension wholesale investors, foundations, endowments, government entities, charities, insurers, etc. In infrastructure (equity and debt), we are confident that the supply of investment opportunities will continue going forward, with IFM being particularly well placed as it can target investments globally depending on where the most attractive opportunities (and optimal pricing) are at any one time. Given the strength of our pipeline, we are actively raising funds from new and existing investors.

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