

Press release

Triodos Investment Management launches new profile funds

Public equity and bond funds renamed to better fit impact investment proposition

Zeist, 15 May 2019 - Triodos Investment Management is introducing three distinct equity and bond mixed funds that are managed to Defensive, Neutral and Offensive risk-return profiles. The new mixed funds are variations of the original Triodos Sustainable Mixed Fund, with the original fund being converted into the neutral profile fund.

With a balanced portfolio of equities and bonds, the new profile funds allow investors to benefit from the advantages of two different asset classes in one investment. The funds are managed to specific risk-return profiles with the following strategic asset allocations:

Triodos Impact Mixed Funds	Equities %	Bonds %
Defensive	~ 25%	~ 75%
Neutral	~ 50%	~ 50%
Offensive	~ 75%	~ 25%

Erik Breen, Director Impact Equities and Bonds at Triodos IM: “From the perspective of investors, exposure to appropriate levels of risk is a key consideration when determining investment strategy. The launch of the new profile funds with different risk/return-levels clearly meets investors’ need for a wider range of funds carefully designed to suit different risk appetites, in combination with a dedicated focus on positive social and ecological impact.”.

The funds’ investment selections are determined by integrated financial and impact analysis, based on Triodos IM’s sustainable transition themes, top-down investment outlook, and bottom-up portfolio considerations, and taking the Triodos’ group-wide minimum environmental and social standards into account.

Furthermore, the portfolios are constructed using a look-through construction of Triodos IM’s equity fund and bond fund. The funds have global exposure and invest primarily in large cap companies across developed markets, and in euro-denominated corporate bonds, sub-sovereign bonds, sovereign bonds and designated green and social bonds.

Distribution of shares of the new funds will start as per 21 June 2019.

Renaming the public equity and bond funds

Besides the launch of the new profile funds in June, all Triodos public equity and bond funds will be renamed as per today.

As the sustainable investment landscape continues to grow with increasing nuance, Triodos IM identified the need to more effectively and accurately convey the impact approach used by its public equity and bond funds. Acting on this awareness, the funds will be renamed to more closely align with their impact investment propositions.

Jacco Minnaar, Chair of the Management Board of Triodos Investment Management: “We observe that the terms ‘Socially Responsible’ and ‘Sustainable’ have numerous interpretations

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within the asset management industry. Both terms represent a spectrum that includes many ‘shades of green’, from light surface level ESG integration to dark green impact investing. We believe that the new fund names better demonstrate what our investments in listed companies and entities seek to do.”

Previous Fund Name	New Fund Name
Triodos Sustainable Equity Fund	Triodos Global Equities Impact Fund
Triodos Sustainable Bond Fund	Triodos Euro Bond Impact Fund
Triodos Sustainable Pioneer Fund	Triodos Pioneer Impact Fund
Triodos Sustainable Mixed Fund	Triodos Impact Mixed Fund - Neutral
*New	Triodos Impact Mixed Fund - Defensive
*New	Triodos Impact Mixed Fund - Offensive

In addition to the name change of the funds, the overall Triodos IM strategy for investing in exchange-listed companies and publicly traded bonds will be renamed from ‘Socially Responsible Investing’ to ‘Impact Equities and Bonds’.

About Triodos Investment Management

Triodos Investment Management connects a broad range of investors who want to make their money work for lasting, positive change with innovative entrepreneurs and sustainable businesses doing just that. In doing so, we serve as a catalyst in sectors that are key in the transition to a world that is fairer, more sustainable and humane.

With our highly professional investment teams, we have built up in-depth knowledge throughout our 25 years of impact investing in sectors such as Energy & Climate, Inclusive Finance, Sustainable Food & Agriculture and Sustainable Real Estate. We also invest in listed companies that materially contribute to the transition toward a sustainable society. Assets under management as per end 2018: EUR 4.2 billion.

Triodos Investment Management is a globally active impact investor and consists of Triodos Investment Management BV and Triodos Investment & Advisory Services BV, both wholly-owned subsidiaries of Triodos Bank NV.