

Avanza launches fund that contributes to solving global sustainability challenges

The latest addition to Avanza's fund offering is Avanza Impact by Circulus, a fund consisting entirely of social and environmental impact companies, i.e. companies that are helping to solve the world's sustainability challenges. Challenges that require enormous resources, but also offer major investment opportunities.

Avanza Impact by Circulus is an Article 9 fund and invests in global micro- and small-cap companies. The objective is that the majority of the turnover from these companies will have direct ties to one or many of the UN's Sustainable Development Goals.

"The UN estimates the investment need to reach the Sustainable Development Goals to USD 5–7 trillion per year. There is no doubt this is an area that will command an enormous amount of attention for the foreseeable future," says Rikard Josefson, CEO of Avanza.

Avanza Impact by Circulus will consist of 40–60 companies. The fund is managed in partnership with Coeli Asset Management AB, with Christofer Halldin, Joakim By and Simon Park as fund managers. The management team has extensive experience in meeting and evaluating global growth companies. High earnings and revenue growth, coupled with lower valuations compared to competitors and indices, are qualities that the fund is looking for. The objective over time is to generate a higher return than the average for global small-cap funds.

"Our aim is to identify social impact companies with major growth potential early in the process. We are focusing on micro- and small-caps, which are often incorrectly priced and provide a greater upside potential," says Christofer Halldin, fund manager at Coeli.

Avanza has for some time been exploring opportunities to offer customers a fund that invests in social and environmental impact companies. Today's launch makes it easier than ever to invest in companies that are actually working with concrete solutions to the world's sustainability challenges, and not only companies that are considered sustainable. The fund's total fee, including transaction costs, is estimated at 1.4%.

"We are very proud of the collaboration and pleased to be able to offer our customers the opportunity to invest in perhaps the most important journey the world is facing – to solve our global sustainability challenges," says Jesper Bonnierv, CEO of Avanza Fonder.

Investments in funds may both increase and decrease in value and there is no guarantee that you will get back your original investment.

For further information please contact:
Rikard Josefson, CEO
+46 70-206 69 55
E-mail: rikard.josefson@avanza.se

Avanza is a digital platform for savings and investments, founded in 1999. The Parent Company, Avanza Bank Holding AB (publ), is listed on the Stockholm Stock Exchange. Avanza's promise is that you as a customer will have more left in your own pocket than with any other bank or pension company. Services include savings in shares, funds and savings accounts, as well as mortgages and a strong pension offering. Avanza has over 1.7 million customers with over SEK 700 billion in total savings capital. This is equivalent to over 6 per cent of the Swedish savings market. Avanza ranks first in terms of number of transactions among Swedish banks on the Stockholm Stock Exchange. For the last thirteen years, Avanza has won SKI's (Swedish Quality Index) award for the "Year's Most Satisfied Savings Customers". For more information, visit: avanza.se/ir