

## Swiss Life Asset Managers expands index-based investment business

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Swiss Life Asset Managers is expanding its offering in the area of index-based investment solutions and will offer its own index funds in equities and fixed income from the first quarter of 2024. For these growth plans, Swiss Life Asset Managers has enhanced its team with proven specialists.

Swiss Life Asset Managers is a leading European provider with a wide range of investment solutions and a wealth of experience in this investment segment. The index-based assets on its insurance balance sheet amount to around CHF 10 billion. With its expanded offering, Swiss Life Asset Managers is responding to the sharp rise in demand for passive investment solutions and is supplementing its existing product range in third-party asset management. The expanded offering can optimally meet customer needs through active or passive investment strategies or a combination of both. Distribution of the new index funds is set to begin in the first quarter of 2024. The index-based investment solutions are being created for Swiss investors in the form of attractive Swiss fund structures from a tax perspective.

Daniel Berner, Head Securities and member of the Executive Committee of Swiss Life Asset Managers, says: “Institutional investors such as pension funds and insurers that want to invest in diversified equities in an index of their choice over the long term will benefit from a broader range of services. I am very pleased to be able to strengthen our team with proven specialists. Our index funds are managed by dedicated fund managers and teams. This ensures that the investable assets are allocated in accordance with the declared

investment objectives. Our customers can place their trust in an established provider of indexed investments such as equities, fixed income and multi-asset.”

The new team will be headed by Stephan Elmenhorst, Head Index Solutions, and be based in Zurich. Stephan Elmenhorst (52) will join Swiss Life Asset Managers on 3 January 2024. Prior to taking up his new role, he was Head Equity Portfolio Management in the area of Index Solutions at Credit Suisse Asset Management since 2016. He is a proven investment specialist with over 20 years’ experience in portfolio management, during which time he held various management positions in the index business of Credit Suisse Asset Management. He holds a Master’s degree in political science from the University of Fribourg. He will report directly to Daniel Berner, Head Securities at Swiss Life Asset Managers.

Mark Fehlmann, Head Sales & Marketing and member of the Executive Committee of Swiss Life Asset Managers, adds: “We are very pleased to be able to offer our customers an expanded offering in the area of indexed investments from the first quarter of 2024. We are confident that there is great demand for index funds, particularly in Switzerland, and institutional clients in Switzerland are sure to appreciate this expansion.”

## Information

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### Swiss Life Asset Managers

Swiss Life Asset Managers has more than 165 years of experience in managing the assets of the Swiss Life Group. This insurance background has exerted a key influence on the investment philosophy of Swiss Life Asset Managers, which is governed by such principles as value preservation, the generation of consistent and sustainable performance and a responsible approach to risks. Swiss Life Asset Managers offers this proven approach to third-party clients in Switzerland, France, Germany, Luxembourg, the UK, Italy and the Nordic countries.

As at 30 June 2023 assets under management for third-party clients amount to CHF 112.2 billion. Together with insurance mandates for the Swiss Life Group, total assets under management at Swiss Life Asset Managers stood at CHF 259.7 billion. Swiss Life Asset Managers is a leading real estate manager in Europe<sup>1</sup>. Of the assets totalling CHF 259.7 billion, CHF 89.6 billion is invested in real estate. In addition, Swiss Life Asset Managers, in cooperation with Livit, manages real estate totalling CHF 21.1 billion in value. Total real estate assets under management and administration at the end of June 2023 thus came to CHF 110.7 billion.

Swiss Life Asset Managers employs more than 2200 people in Europe.

### Self-determined Life

Swiss Life enables people to lead a self-determined life and look to the future with confidence. Swiss Life Asset Managers pursues the same goal: We think long-term and act responsibly. We use our knowledge and experience to develop future-oriented investment solutions. This is how we support our customers in achieving their long-term investment objectives, which in turn also take account of their client's needs so they can plan their financial future in a self-determined manner.

<sup>1</sup> INREV Fund Manager Survey 2023 (AuM as of 31.12.2022)

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