



## **OYSTER Sustainable Europe obtains the SRI Label**

Paris, London, November 17, 2020, iM Global Partner has announced that OYSTER Sustainable Europe fund has obtained the SRI Label. The milestone arrives as iM Global Partner deepens its commitment to offering high-alpha sustainable active solutions to European investors.

OYSTER Sustainable Europe is delegated to Zadig Asset Management leading European equities specialist. Zadig applies a committed responsible investment strategy, which is aligned with Zadig's DNA and active management style as well as takes into account European companies' alignment with United Nations (UN) Sustainable Development Goals.

Zadig has been a signatory of the UN Principles for Responsible Investment since 2015 and Zadig's flagship fund, Memnon European Equity, obtained the LuxFLAG ESG label in June 2019. The OYSTER Sustainable Europe fund is managed with both Environmental, Social and Governance (ESG) integration and a Sustainable and Responsible Investment (SRI) framework.

### **Creating SRI transparency for European investors**

The French government-issued SRI label ([www.lolabelisr.fr](http://www.lolabelisr.fr)) was launched on 18 November 2016 by its Ministry of Economy and Finance. Products seeking to obtain the label must meet a rigorous and exacting standard to demonstrate that they are managed using robust methods, are firmly committed to transparency and provide high-quality information.

The OYSTER Sustainable Europe fund has obtained the SRI Label, after a labelling process carried out independently by EY (Ernst and Young), based on precise and demanding specifications.

Philippe Uzan, CIO of asset management at iM Global Partner, said: "We are delighted to meet the full recommendations of the SRI Label, as we seek to deliver high-alpha sustainable solutions to more European investors. Sustainable and Responsible Investing is an integral part of our range of solutions. We welcome the recognition the label brings, as it will enhance our engagement and access to fund selectors and institutions across Europe.

"We will maintain our transparency across European jurisdictions and the investment team will continue to engage with hundreds of companies to assess ESG standards and the sustainability of companies."

The label allows SRI funds to clarify their approach to investors and other stakeholders in an accessible and comparable format. Underpinning the label is a guiding principle stating investors should be open, honest and disclose accurate, adequate and timely information. This is crucial to enable stakeholders to understand the policies and practices of funds available to investors.

### **Sustainable investing at a reasonable price**

OYSTER Sustainable Europe portfolio is based on Zadig Asset Management's European equities research and favours companies reaching an above-average share of sustainable revenues while maintaining reasonable valuation ratios.

Since 2018, Zadig has formalised its ESG integration approach. This now includes systematic integration of ESG indicators in the valuation of companies and portfolio construction, as well as detailed investor reporting on ESG, sustainability, engagement activity and votes.

Adrian Vlad and Louis Larere, co-portfolio managers of OYSTER Sustainable Europe, added: "We are delighted that our investment process was recognised by the SRI Label. This milestone is further evidence of our commitment to make sustainable investment accessible and transparent to European investors. OYSTER Sustainable Europe strategy has allowed us to realise our vision of responsible investment with the dual aim of outperforming the market, as well as investing in companies contributing to the Sustainable Development Goals as defined by the UN.

“In our unique and differentiating *Sustainability at a Reasonable Price* strategy, we aim to build a concentrated portfolio that goes beyond ESG integration and focuses on businesses that actively address sustainable development themes, while remaining style agnostic and valuation minded.”

**ENDS**

#### Notes to editors

#### **About iM Global Partner**

iM Global Partner is a worldwide asset management network who selects and builds long-term partnerships with talented and independent asset management companies through direct capital ownership.

iM Global Partner is present in 11 locations across Europe and the United States and provides its clients with access to the best management strategies of its Partners.

iM Global Partner’s wide range of investment solutions thus includes the OYSTER range, a Luxembourg SICAV, but also mutual funds and ETFs dedicated to US investors.

iM Global Partner represents around \$18bn of assets under management at the end of October 2020.

[www.imgp.com](http://www.imgp.com)

#### **About Zadig Asset Management**

Zadig Asset Management is a leading European investment firm that applies rigorous valuation and governance criteria, underpinned by ESG principles, to active, concentrated equity investing. It runs UCITS funds and managed accounts for institutional investors seeking high conviction investment ideas to deliver performance. The firm manages \$2bn for institutional investor, private bank and family office clients in Europe and the US.

[www.zadig.lu](http://www.zadig.lu)

#### **LEARN MORE ABOUT THE SRI LABEL**

The SRI Label is a tool to facilitate the identification of responsible and sustainable investments.

Created and supported by the French Ministry of Finance, its aim is to make investment products more visible for investors in France and Europe who are sensitive to environmental, social and governance performance, beyond financial performance.

To obtain the SRI Label, the fund must comply with a series of criteria divided into six themes defined by decree:

- the general objectives (financial and ESG) sought by the fund. The aim is to verify that these objectives are precisely defined and described to investors and that they are taken into account in the definition of the policy of the fund's investment;
- the ESG criteria analysis and rating methodology used by the companies in which the fund invests;
- the consideration of ESG criteria in the construction and life of the portfolio;
- the ESG engagement policy with the companies in which the fund invests (voting and dialogue);
- transparency in the management of the fund;
- the measurement of the positive impacts of ESG management on the development of a sustainable economy.

Link to the SRI Label website: [www.lelabelisr.fr](http://www.lelabelisr.fr)