

Swiss Life Asset Managers to merge its infrastructure asset management companies

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Swiss Life Asset Managers and Fontavis AG are pooling their competencies for infrastructure investments into a single company and are continuing to expand the platform.

In 2019, Swiss Life Asset Managers acquired Fontavis, an asset manager specialising in clean energy infrastructure. The offering, investment philosophy and entrepreneurial culture of Fontavis optimally complement those of Swiss Life Asset Managers. While the Swiss Life Asset Managers' Infrastructure team follows a broad sector approach with large transactions worldwide, Fontavis focuses on clean energy projects with small and medium-sized transactions, mainly in Switzerland and Europe.

In July 2021, Swiss Life Asset Managers adapted its organisation and placed both teams under the leadership of Christoph Gisler, Head of Infrastructure Equity and member of the Executive Board of Swiss Life Asset Managers.

Fontavis AG will now be merged with its sister company Swiss Life Asset Managers in order to systematically pursue the expansion of the infrastructure area and thus the implementation of its qualitative growth strategy. Fontavis investors in the Luxembourg collective investments will now be managed by Swiss Life Asset Managers customer advisors. The contact persons for portfolio holdings will remain unchanged. The merger was approved by FINMA and completed with an entry

in the Commercial Register on 3rd December 2021.

"The legal merger will enable Swiss Life Asset Managers to maintain a unified market presence and tackle new projects together. The investment policy and investment processes remain unchanged for our customers. They benefit from the combined expertise of our team which now comprises over 40 investment specialists, an innovative offering and an excellent track record. Our customers can draw on a proven, long-term and sustainability-oriented investment philosophy," comments Christoph Gisler, Head Infrastructure Equity at Swiss Life Asset Managers.

Swiss Life Asset Managers has been investing in infrastructure investments for its insurance companies and third-party clients for many years. Worldwide, around CHF 7.5 billion in assets under management are invested in the energy, utilities, disposal, communication, transport and social infrastructure sectors. The investment portfolio comprises around 60 direct investments. The investment strategies include "Global Core," "Global Growth" and "Clean Energy & Infrastructure Switzerland and Europe," which are implemented in the form of funds, individual mandates or investment foundations.

Information

Media Relations

Phone +41 43 284 77 77

media.relations@swisslife.ch

www.swisslife-am.com



Swiss Life Asset Managers

Swiss Life Asset Managers has more than 160 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. That's how we lay the groundwork for our clients to make solid, long-term plans - in self-determination and with financial confidence. Swiss Life Asset Managers offers this proven approach to third-party clients in Switzerland, France, Germany, Luxembourg and the UK.

As at 30 June 2021 assets under management for third-party clients amount to CHF 98.9 billion. Together with insurance mandates for the Swiss Life Group, total assets under management at Swiss Life Asset Managers stood at CHF 274.4 billion. Swiss Life Asset Managers is a leading real estate manager in Europe¹. Of the assets totalling CHF 274.4 billion, CHF 81.8 billion is invested in real estate. In addition, Swiss Life Asset Managers, in cooperation with Livit, manages real estate totalling CHF 28.8 billion in value. Total real estate under management and administration at the end of June 2021 thus came to CHF 110.6 billion.

Swiss Life Asset Managers employs more than 2400 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.

¹INREV Fund Manager Survey 2021 (AuM as of 31.12.2020)

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