

ABOUT COLUMBIA THREADNEEDLE INVESTMENTS

Investing smarter for the world you want

At Columbia Threadneedle Investments, we offer investments to make a difference to your world, and the wider world. Millions of people rely on us to manage their money and invest for their future; together they entrust us with €565 billion.

We are globally connected

Our reach is expansive, with 2,500 people – including more than 650 investment specialists – spanning the world. But for us, a global perspective is about more than numbers; it is about the smarter advantage we create when we bring our teams' insights together. We've built our diverse expertise and on-the-ground knowledge into our investment processes and solutions, covering almost every asset class and market.

We are intense about research

We share a belief that original, independent research makes investment decisions smarter. We have over 200 research associates around the globe, and proprietary tools harnessing big data and next generation analytics. This allows us to turn information into forward-looking insights that can add real value to our investment decisions, enhancing our ability to help deliver good outcomes for our clients.

We have a responsible ethos

We think our Responsible Investment (RI) capabilities can help you contribute through your investments to shaping the future world you seek. This continually pushes us forward in how we seek to operate as a business in developing our in-depth RI research capability as support for portfolio construction.* As a responsible investor, partner, and citizen we're building our RI capabilities needed to help you, our clients, achieve your financial goals while seeking to shape the world you want to live in.

We focus on continuous improvement

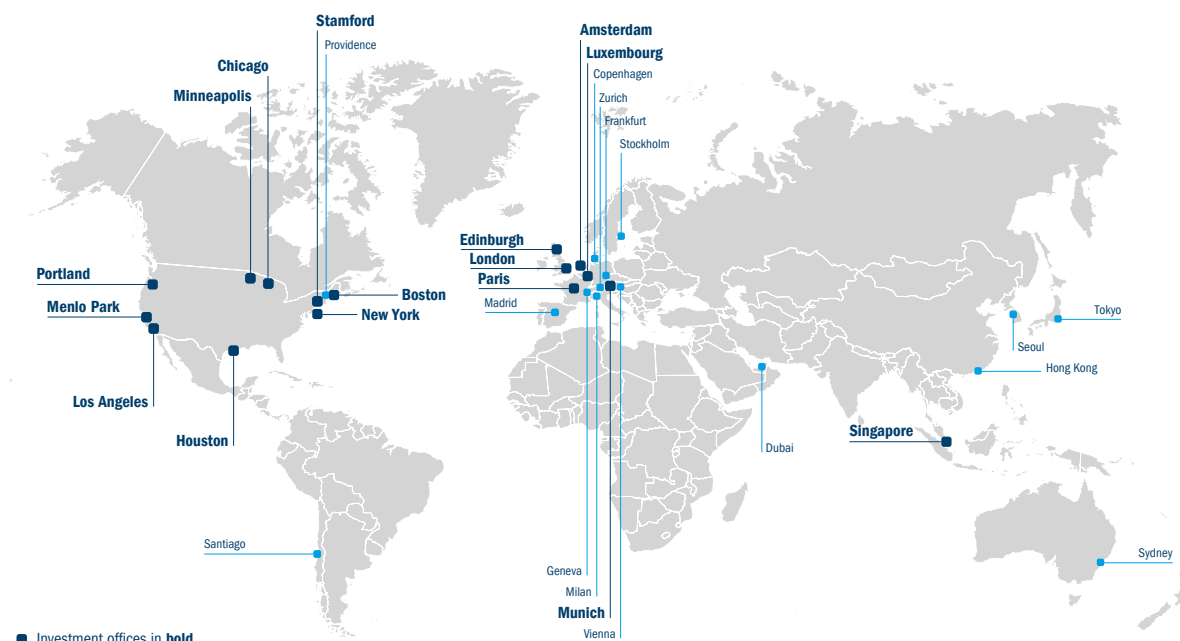
Markets don't stand still and neither do we. Every day, we're looking for opportunities to improve how we invest and what our clients experience – be it the independent oversight teams that ensure the robustness of our investment processes, the emphasis we place on developing our talent, or the innovative solutions that we offer. The world is continually changing, and with it our clients' needs, which is why we are always evolving.

Whatever world you want, our purpose is to help you achieve it.

Key facts**

- AUM: €565 billion
- Focus is active management of client assets
- Over 2,500 people globally including more than 650 investment professionals
- Present in 19 countries across Europe, Middle East, Asia Pacific, North America and South America
- Part of Ameriprise Financial, Inc.

Global on-the-ground presence



Source: Columbia Threadneedle Investments, as at 30 June 2023.

*Although RI research is made available to all portfolio managers, each portfolio management team within our firm makes its own investment decisions and certain teams may place more, less or no emphasis on such research in any given investment decision.

**AUM includes externally managed funds under administration as well as all assets managed on a discretionary or non-discretionary basis by the entities in the Columbia Threadneedle Investments group of companies.

Investment approach

At Columbia Threadneedle, we are intentionally built to help you succeed. We equip our investment professionals with the resources, tools and insights they need to help achieve or surpass the outcomes our clients expect. Our commitment to consistent client success is underpinned by our distinctly different investment approach, informed by intense research.

Global perspectives: From meeting companies on the ground and around the world, to gaining an understanding of the economic, social and political trends that shape our future, the continuous exchange of insights across asset classes and sectors is ingrained in our process. These insights are debated by analysts and portfolio managers around the globe to ensure every perspective is considered.

Research intensity: Our team of over 200 analysts and research associates is dedicated to original, independent research. Working collaboratively across all major asset classes our teams utilize big data and analytics, such as machine learning and augmented intelligence, to turn information into forward-looking insights that can add real value to our investment decisions, enhancing our ability to help deliver good outcomes for our clients.

Responsible Investment: Well-managed companies that look to the future are better positioned to navigate the risks and challenges inherent in business and achieve sustainable performance and long-term value creation. Responsible Investment (RI) principles are an important factor, and we have developed proprietary tools that provide a robust RI framework and better analysis for portfolio managers to enhance their decision-making.

Although RI research is made available to all portfolio managers, each portfolio management team within our firm makes its own investment decisions and certain teams may place more, less or no emphasis on ESG factors in any given investment decision.

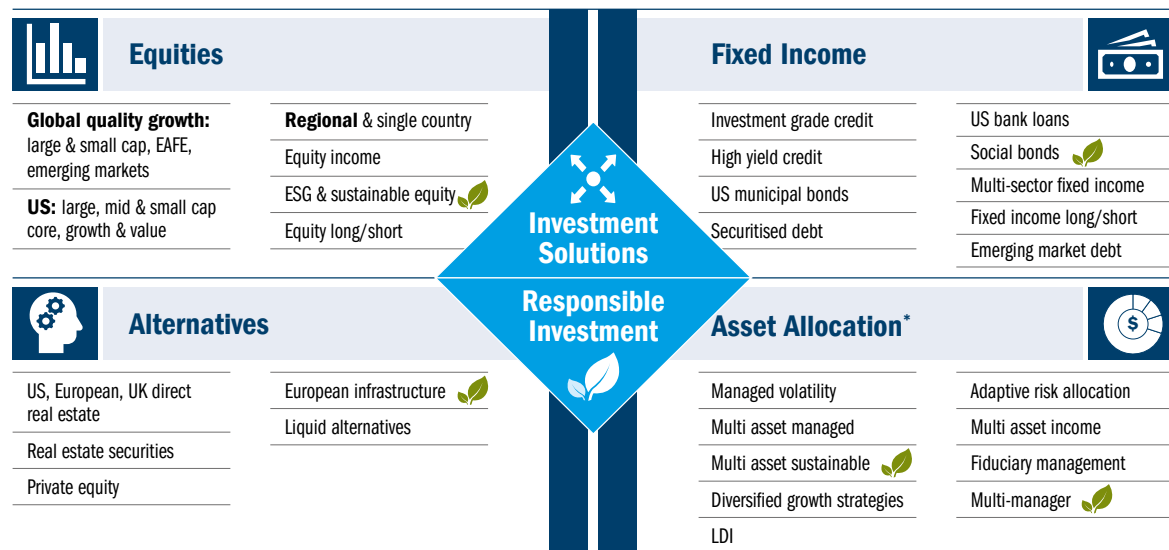
Continuous improvement: Across our global business, our Investment Consultancy & Oversight team uses a governance framework to ensure the integrity of an investment strategy. The team engages with our portfolio managers – reviewing their performance, discussing their decision-making and analyzing their processes, all to ensure we remain faithful to our clients' objectives and identify opportunities to continually improve. This process is tangible evidence of our commitment to accountability.

Investment capabilities

Our investment capabilities are carefully created and designed with our clients' needs in mind.

We offer choice and expertise across the risk/reward spectrum, from traditional long-only investments through to specialist alternative vehicles and investment solutions.

Core investment capabilities



Source: Columbia Threadneedle Investments, as at 30 June 2023. (*) The asset allocation category refers to accounts that invest across multiple asset classes, such as equities, fixed income and alternatives. This includes fund of fund strategies and accounts that directly invest in those broad asset classes, such as multi-asset strategies.

To find out more visit columbiathreadneedle.com



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Issued 08.23 | Valid to 12.23 | 460020_EURO | 5874858