iM Global Partner

Marco Orsi, Sales Director Italy & Greece

For Professional Investors only

Un partner affidabile

La nostra missione

Collaborare con società di gestione degli investimenti indipendenti di eccezionale talento attraverso la proprietà diretta del capitale a lungo termine, costruendo un business innovativo e intelligente che crea valore per i nostri clienti e partner.

I nostri valori

Spirito imprenditoriale

Longevità

Rispetto mettendosi alla prova

Integrità

2013
FOUNDED IN

19.4
BN USD AUM*

11
GLOBAL LOCATIONS

50
EMPLOYEES

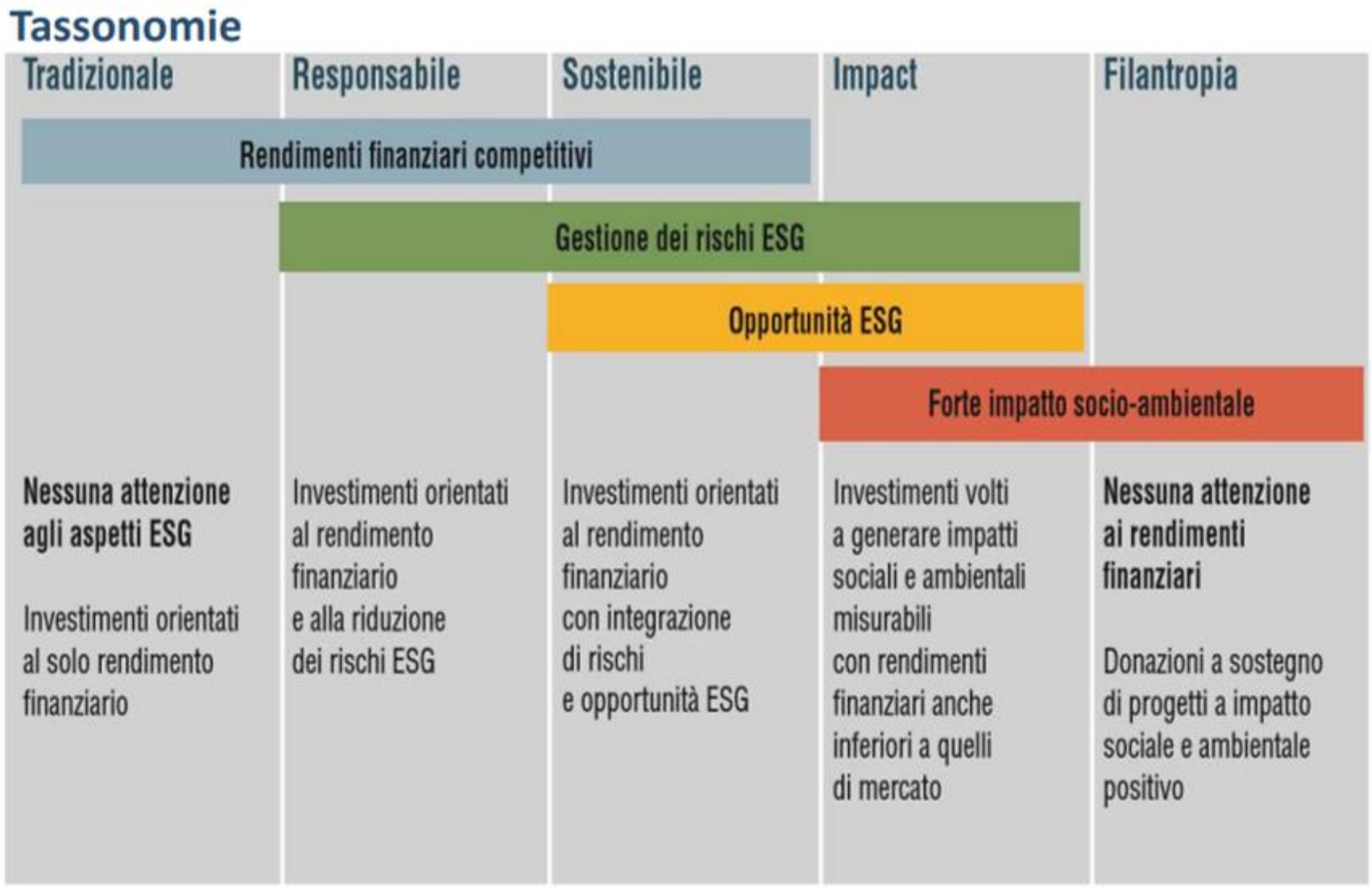
Source iM Global Partner, data as of December 2020.
*Assets under management include Partner assets in proportion to iM Global Partner's participations.

Agenda

- Tema 1 : Sostenibilità vs ESG per Zadig AM
- Tema 2 : 3 caratteristiche positive dei corporate bond US per Dolan Mc Eniry

Primo tema
Sostenibilità vs ESG per Zadig AM

Tassonomia



Fonte: Rielaborazione Forum per la Finanza Sostenibile da Eurosif 2012, *European SRI Study*

Come creare un impatto positivo per la società e rendimenti per gli investitori

- Siamo convinti che una corretta due diligence ESG porti a una migliore comprensione dei rischi e delle opportunità, ma diffidiamo dal guardare solo ai rating per due motivi:

  - I fornitori di rating tendono a non essere d'accordo tra loro
  - Fare confronti solo all'interno di un «peer group» può offuscare l'impatto che un'azienda ha sul mondo

Alla ricerca di miglioramenti in termini di sostenibilità

In Zadig la filosofia è « Sostenibilità ad un prezzo ragionevole»

- La parola sostenibilità è importante perché il nostro obiettivo primario è quello di investire in aziende che affrontano in modo significativo temi sostenibili o che stanno attraversando una fase di transizione verso un'attività più sostenibile
- Questa filosofia non significa che l'analisi ESG non sia cruciale nel nostro processo. Al contrario, l'ESG è parte integrante della selezione delle azioni di tutti i fondi di Zadig
- L'intero mercato si sta rivolgendo all'ESG e all'SRI per idee di investimento redditizie, c'è la tendenza degli investitori a concentrarsi esclusivamente su una manciata di leader di oggi
- Zadig sta guardando avanti con un orizzonte di due o tre anni concentrandosi sulle aziende che stanno apportando miglioramenti radicali. Così facendo, differenziamo i nostri portafogli dalla concorrenza ed evitiamo i pericoli di una **"bolla verde"**

Secondo tema:
3 caratteristiche positive dei corporate bond US

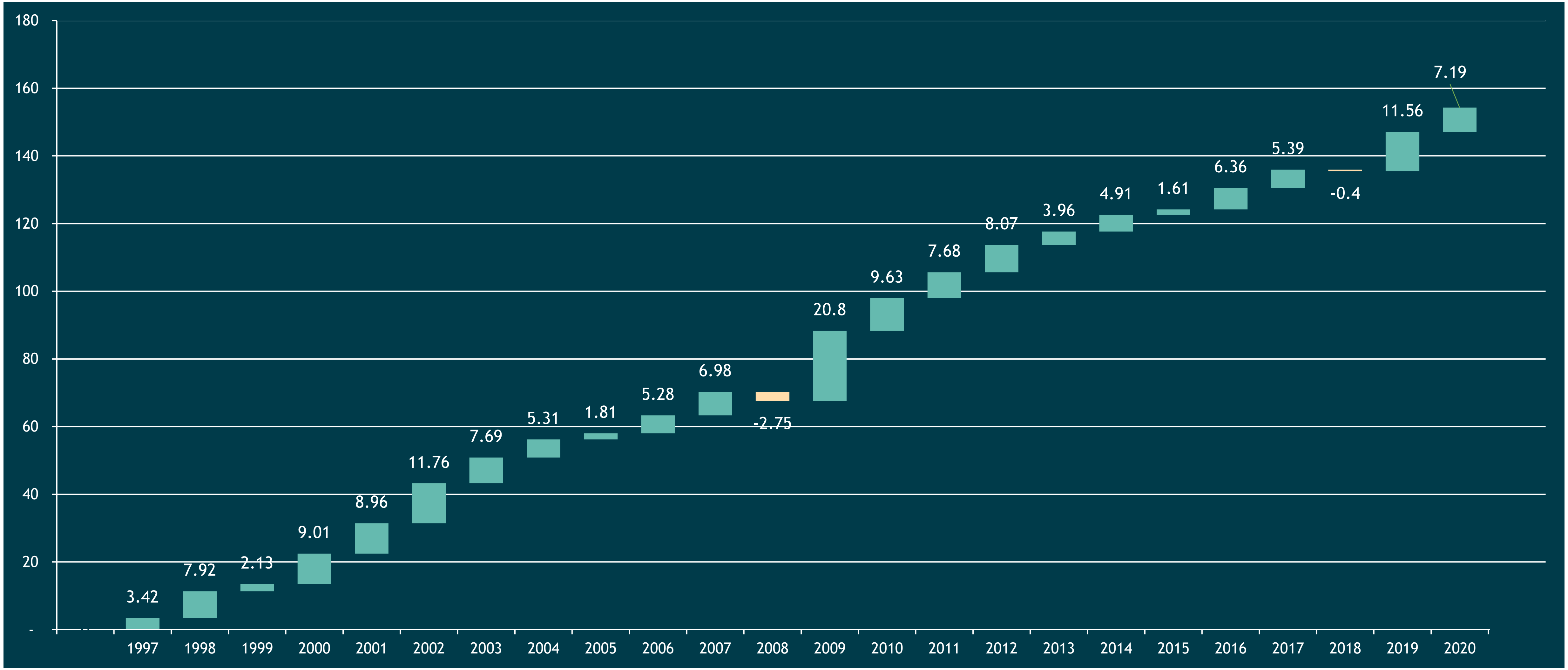
Il mercato del credito americano è più grande di quello europeo. La BCE è più attiva negli acquisti rispetto alle dimensioni del mercato in confronto alla Fed

Source: Bloomberg; Full market value US Corporate and European Corporate Bonds in local currency (BBB issuers)

Le obbligazioni europee hanno, in media, spread inferiori a quelli degli Stati Uniti a parità di rating.

Source: Bloomberg, Spread of US and European Corporate Bonds vs Governative Bonds (BBB issuers)

I gestori che hanno aggiunto alfa negli ultimi 20 anni attraverso la scelta dei titoli piuttosto che pilotando la duration sono preferibili in un ambiente di controllo dei tassi.



Souce: iM Global Partner and Dolan Mc Eniry (gross annual absolut return performance). La performance passata non è un indicatore affidabile dei risultati futuri

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CHI SIAMO | PARTNERS | FONDI FOCUS | OYSTER FUNDS | FONDI US | NOTIZIE | CONTATTI

Fondamenta solide per la crescita futura

Dopo aver integrato nella sua gamma la Sicav OYSTER, presente in Europa da 25 anni, iM Global Partner continua a crescere e a sfruttare il talento del suo team di grande esperienza.
Gli alti standard di eccellenza di iM Global Partner garantiscono ai nostri clienti l'accesso esclusivo a manager di altissimo livello, tutto all'interno del pratico veicolo della gamma OYSTER.
Il 2021 è ora disponibile per nuove opportunità, per questo motivo mettiamo a fuoco quattro soluzioni d'investimento che evidenziano un certo potenziale di crescita del capitale attraverso rendimenti sostenibili nel lungo termine.

CONTATTATECI

Scoprite le nostre soluzioni d'investimento di alta qualità

AZIONI EUROPEE
OYSTER Sustainable Europe
Gestito da ZADIG Asset Management

US CORPORATE BONDS
OYSTER US Core Plus
Gestito da Dolan McEniry

AZIONI US GROWTH
OYSTER US Small and Mid Company Growth
Gestito da polen capital

AZIONI US VALUE
OYSTER US Value
Gestito da SCHARF INVESTMENTS

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Thank you

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