

**Amundi**  
Investment Solutions

Trust must be earned

CORPORATE BROCHURE

**Your trusted partner, working every day  
in your interest and for society**

December 2024

# About us



More than  
**€2.2 trillion**  
of assets under management<sup>(2)</sup>

**N°1** European  
asset manager  
in the global top 10 players<sup>(1)</sup>

**5,700**  
employees<sup>(2)</sup>  
including **900** investment professionals



► More than **100 million** retail clients<sup>(2)</sup>  
through around **600** savings  
and wealth managers<sup>(2)</sup>

More than  
**60,000** users on  
our technology platforms<sup>(2)</sup>



► **1,000** institutional  
and corporate clients<sup>(2)</sup>

**1<sup>st</sup>** among the 10 largest  
global asset managers for its  
**votes** on environment and  
social-related shareholder resolutions<sup>(3)</sup>



**35** countries

## A GLOBAL PRESENCE WITH THE STRENGTH OF LOCAL ROOTS

### AMERICAS

- Boston
- Durham
- Mexico City
- Miami
- Montreal
- Santiago
- Toronto

### EUROPE

- Amsterdam
- Barcelona
- Bratislava
- Brussels
- Bucharest
- Budapest
- Casablanca
- Dublin
- Frankfurt
- Geneva
- Helsinki
- London
- Luxembourg
- Madrid
- Milan
- Munich
- Paris
- Prague
- Sofia
- Stockholm
- Vienna
- Warsaw
- Zurich

### MIDDLE EAST

- Dubai
- Yerevan

### ASIA

- Bangkok
- Beijing
- Hong Kong
- Kuala Lumpur
- Mumbai
- Seoul
- Shanghai
- Singapore
- Taipei
- Tokyo

- Investment hubs
- Local investment centres
- Other Amundi entities
- Joint ventures

(1) Source: IPE "Top 500 Asset Managers" published in June 2024, based on assets under management as at 31/12/2023.

(2) Amundi data as at 31/12/2024.

(3) ShareAction Voting Matters 2023.





# Leveraging our history...

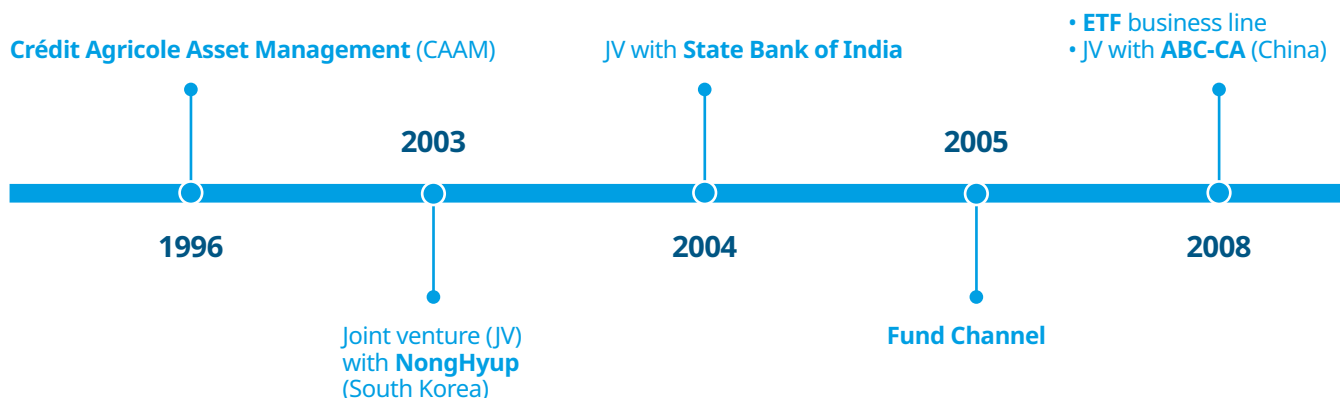
“ Our priority is to work for you every day to create investment solutions tailored to your needs and the market environment. We empower you to enhance your investment decisions with innovative financial services and technology solutions. Committed to sustainable finance from the outset, we can play a major role in the energy transition of the global economy. ”

**VALÉRIE BAUDSON**  
Chief Executive Officer

## OUR FOUNDING PILLARS



## OUR MILESTONES



(1) AuM: assets under management.  
(2) Société Générale Asset Management.

# ...to better serve our clients...



## INDIVIDUAL INVESTORS

**Savings solutions** tailored to your personal goals (education, property, retirement...), risk profile and investment horizon, through **your usual advisors**.



## SAVINGS AND WEALTH MANAGERS

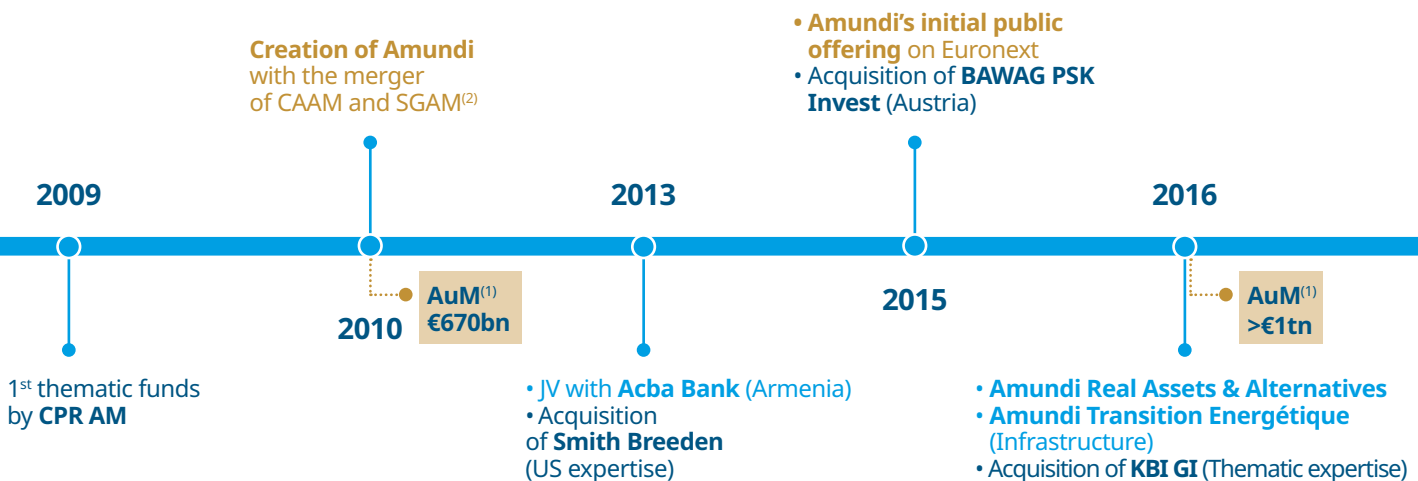
The **best financial services** and **innovative technology solutions** across the entire savings value chain for:

- retail banks
- private banks
- independent financial advisors
- family offices
- asset managers
- online banks and digital platforms

## INSTITUTIONAL INVESTORS

**Customised investment solutions** to seize opportunities in a regulated environment for:

- insurers
- corporates (including employee savings and retirement solutions)
- pension funds
- central banks
- sovereign wealth funds



# ...with our investment solutions



## Research

**INVESTMENT INSTITUTE**  
60 experts delivering world-class research and advice

**FINANCIAL ANALYSIS**  
190 economists and analysts in major financial centres

**EXTRA-FINANCIAL ANALYSIS**  
40 ESG and corporate governance analysts



## Leading the way in responsible investment

through:

- responsible investment solutions
- continued dialogue with companies to encourage them to accelerate their transition
- our own governance



## Investment

### ACTIVE MANAGEMENT

- Equity
- Fixed income
- Multi-asset
- Liquidity solutions

### PASSIVE MANAGEMENT

- ETFs
- Equity and bond index management
- Smart beta and factor investing

### ALTERNATIVE ASSETS

- Real estate
- Private debt
- Private equity
- Infrastructure
- Hedge funds

### STRUCTURED SOLUTIONS

- CPPI
- Formula funds
- Strategy funds
- Structured notes
- Employee stock ownership funds

An integrated risk management process securing the delivery of our client promise.



## Technology

- Portfolio management systems
- Wealth and distribution platforms
- Dealing services
- Robo-advisor
- Data management



## Services

- Open architecture solutions, including fund selection
- Fund distribution services
- OCIO wealth and institutional solutions
- Operational services
- Training programmes



- Acquisition of **Sabadell AM** (Spain)
- JV **Amundi BOC Wealth Management** (China)

- **Amundi Investment Institute**
- Acquisition of **Lyxor AM** – ETF and Alternatives (Europe)

2017

2020

2021

AuM<sup>(1)</sup>  
>€2tn

2022

2024

Acquisition of **Pioneer Investments**

- **Amundi Technology**
- **Outsourced Chief Investment Officer Solutions (OCIO)**
- **Open architecture solutions**

- Acquisition of **Alpha Associates** – Multi-management of Private Assets
- Signature of a partnership agreement with **Victory Capital** (US expertise)
- Acquisition of **aixigo** – Technological solutions (Germany)

## Being your trusted partner means:



- ▶ addressing your needs every day,
- ▶ tackling with you the major challenges in savings and investment,
- ▶ supporting your investment decisions through innovation and technology,
- ▶ working with you for a just transition.



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<https://about.amundi.com/>

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in    

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