



Amundi
Investment Solutions

Trust must be earned

CORPORATE BROCHURE

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

March 2025

About us

N°1 European
asset manager
in the global top 10 players⁽¹⁾

More than
€2.2 trillion
of assets under management⁽²⁾

5,700
employees⁽²⁾



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

More than
60,000 users on
our technology platforms⁽²⁾

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



35 countries

A GLOBAL PRESENCE WITH THE STRENGTH OF LOCAL ROOTS

AMERICAS

- Boston
- Mexico City
- Miami
- Montreal
- **San Antonio⁽⁴⁾**
- Santiago
- Toronto

EUROPE

- Aachen
- 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 31/03/2025.

(3) ShareAction Voting Matters 2024.

(4) Via our strategic partnership with Victory Capital.



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



**CLIENTS' NEEDS
AND PROXIMITY**



**PRODUCT AND
SERVICE QUALITY**



**EFFICIENT
ORGANISATION**



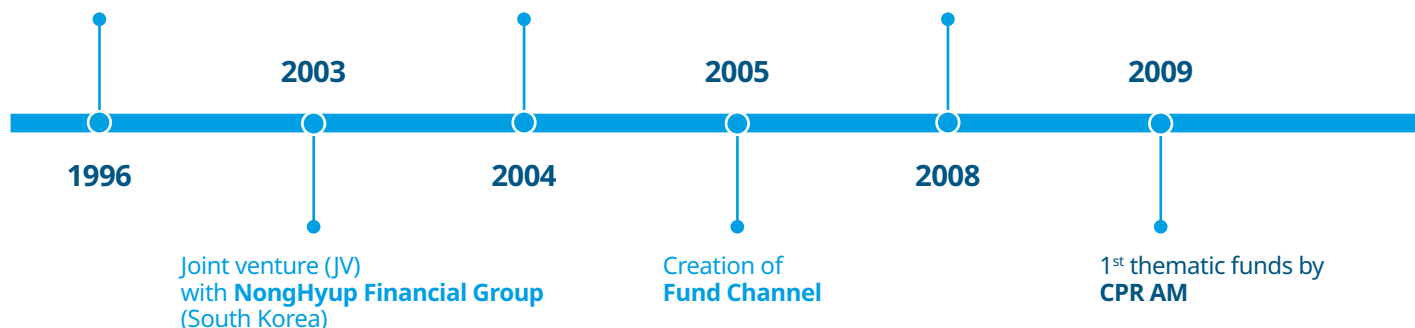
**SOCIETAL
ENGAGEMENT**

OUR MILESTONES

Crédit Agricole
Asset Management (CAAM)

JV with
State Bank of India

• ETF business line
• JV with ABC-CA (China)



(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

Creation of Amundi
with the merger
of CAAM and SGAM⁽²⁾

2010

AuM⁽¹⁾
>€700bn

2013

- JV with **Acba Bank** (Armenia)
- Acquisition of **Smith Breeden** (US expertise)

2015

- **Amundi's initial public offering** on Euronext
- Acquisition of **BAWAG P.S.K. Invest** (Austria)

2016

- **Amundi Real Assets & Alternatives**
- **Amundi Transition Énergétique** (Infrastructure)
- Acquisition of **KBI GI** (Thematic expertise)

AuM⁽¹⁾
>€1tn

2017

Acquisition of
Pioneer Investments

...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



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
- Robo-advisor
- Data management



Services

- Open architecture solutions, including fund selection
- Fund distribution services
- Dealing services
- Outsourced Chief Investment Officer (OCIO) Institutional solutions
- Wealth management and family offices
- Business Process Outsourcing
- Training programmes



Leading the way in responsible investment

through:

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



2020

- Acquisition of **Sabadell AM** (Spain)
- JV with **Bank of China**

2021

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

AuM⁽¹⁾
>€2tn

2022

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

2024

- Acquisition of **Alpha Associates** – Multi-management of private assets
- Acquisition of **aixigo** – Technological solutions (Germany)

2025

Strategic partnership with **Victory Capital** (US expertise)

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.



MORE ABOUT US
<https://about.amundi.com/>

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Investment Solutions

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