

Amundi
Investment Solutions

Trust must be earned

CORPORATE BROCHURE

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

September 2024

About us



Close to
€2.2 trillion
of assets under management⁽²⁾

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

5,500
employees⁽²⁾ 
including **900** investment professionals

► 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⁾

► **1,000** institutional
and corporate clients⁽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
- 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 30/09/2024.

(3) ShareAction Voting Matters 2023.



Leveraging our history...

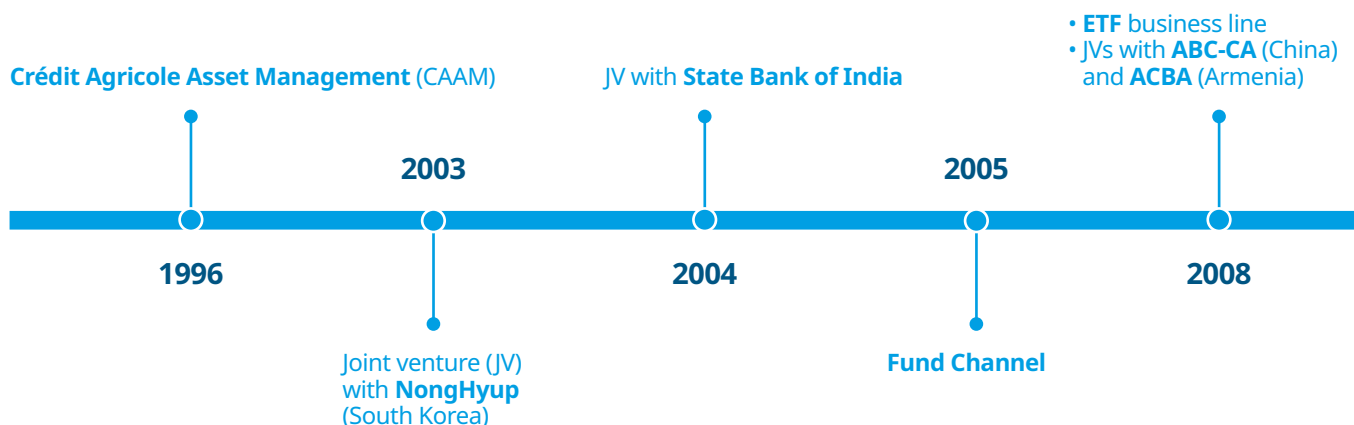
“ Our priority is to work for you every day to create investment solutions tailored to your needs and the market environment. We empower you to enhance your investment decisions with innovative financial services and technology solutions. Committed to sustainable finance from the outset, we can play 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

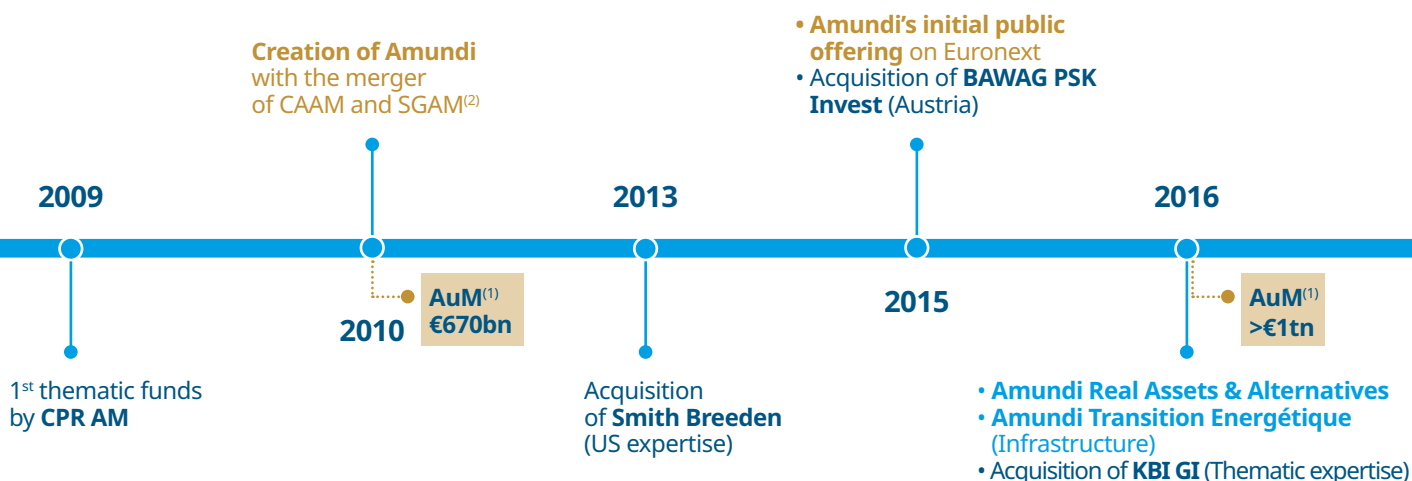
The **best financial services** and **innovative technology solutions** across the entire savings value chain for:

- 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

11 specialised teams comprising over 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 and Services

- 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⁽¹⁾
>€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)

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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