

Press release

Robeco launches enhanced Global Multi-Thematic strategy

Rotterdam, 4 June 2024 – Robeco has strengthened its thematic position by launching its new Global Multi-Thematic strategy, which offers a turnkey solution to clients seeking long-term returns from megatrends.

By bottom-up stock picking across all its thematic strategies,¹ Robeco aims to amplify overall returns while minimizing the concentration risks and volatility associated with single themes. It builds on the already existing Megatrends fund, with a history of over ten years. The current global total AuM for active thematic equities is over EUR 400 billion, with an expected annual organic growth of more than 10%.²

The Global Multi-Thematic strategy is a global equity portfolio that draws from Robeco's comprehensive thematic range to efficiently capture and amplify the upside potential of powerful themes while mitigating downside risk. The strategy applies a systematic, dynamic investment process. It allocates and calibrates exposure to the most promising underlying themes and companies from across Robeco's diverse range of thematic equity strategies. The strategy targets three key themes: Transforming Technologies, Changing Socio-demographics, and Preserving Earth.

Robeco's enhanced multi-thematic strategy will be led by a dedicated team of three seasoned portfolio managers (Dora Buckulcikova, Marco van Lent, Steef Bergakker) and two investment analysts, together with a network of thematic ambassadors. These thirteen ambassadors of Robeco's thematic strategies are directly delivering their investment ideas providing deep expertise, in-depth analysis and insights from their respective thematic domains.

Ralf Oberbannscheidt, Head of Thematic Investing at Robeco: "As a global asset manager, Robeco enables clients to achieve both their financial and sustainability goals by providing superior investment returns and solutions. With our strengthened Global Multi-Thematic strategy, we offer our clients the opportunity to invest in the most relevant themes, while at the same time the bundling of these thematic strategies in one capability provides diversification and volatility adjusting benefits. Our choice of these trends reflects our belief in the significant economic value of addressing inefficiencies, inequalities, and imbalances in business, society, and the environment. This value is often underappreciated by broader markets. We're now able to offer our clients the possibility to invest in 3 secular trends and 13 innovative thematic strategies through one single strategy."

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About Robeco

Robeco is a pure-play international asset manager founded in 1929 with headquarters in Rotterdam, the Netherlands, and 16 offices worldwide. A global leader in sustainable investing since 1995, its integration of sustainable as well as fundamental and quantitative research enables the company to offer institutional and private investors an extensive selection of active investment strategies, for a broad range of asset classes. At the end of December 2023, Robeco had EUR 181 billion in assets under management, of which EUR 176 billion is committed to ESG integration. Robeco is a subsidiary of ORIX Corporation Europe N.V. More information is available at www.robeco.com.

*1 List of all Thematic strategies included (alphabetically ordered):

Biodiversity
Circular Economy
Digital Innovations
Fashion Engagement
FinTech
Global Consumer Trends
New World Financials
Next Digital Billion
Smart Energy
Smart Materials
Smart Mobility
Sustainable Water
Sustainable Healthy Living

*2: Source: Broadridge, provided estimate is on a three-year average expected annual growth.