

PRESS RELEASE

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Qblue Global Sustainable Leaders Fund Celebrates its 1st Anniversary

London-based Heptagon Capital, the USD12bn (as of 31 December 2022) asset management firm, has just marked the first anniversary of its newest UCITS fund, the 'Qblue Global Sustainable Leaders Fund' with over USD430m in AUM. The SFDR Article 9 Fund is sub-advised by Copenhagen-based Qblue Balanced, founded by financial services veteran, Bjarne Graven Larsen, former CIO at ATP and Ontario Teachers' Pension Plan.

The Sustainable Finance Disclosure Regulation (SFDR) is a European regulation introduced to improve transparency in the market for sustainable investment products. Article 9, which is achieved through having sustainable investment as an objective alongside financial return, is the highest EU sustainability classification and has the most stringent requirements.

"We are proud of our partnership with Qblue and the support received from investors," says Heptagon's CEO Tarek Mooro. "Despite the current climate, this strategy has found favour among UCITS fund buyers raising over USD430m in its first year, helping both to endorse and reassure that our model remains of real value to investors. We are very fortunate as a firm to partner with some outstanding portfolio managers who share our sustainable investing philosophy and principles. In a challenging year where regulatory pressure in Europe has led to fund managers downgrading the SFDR classification of more than USD140bn in Article 9 funds, we are confident in Qblue's sustainable credentials and the Fund's current SFDR classification."

The Fund has recently been shortlisted for Best ESG Global Equity Fund in the ESG Investing Awards 2023. The seed (C USD) share class, which is now closed to new investors, outperformed its benchmark, the MSCI World NR USD, for the first year since inception on 12th January 2022, returning -11.6% compared to -14.0%, it has also outperformed the MSCI World ESG Leaders NR USD Index which was down -14.8% over the same period (*source: Bloomberg as of 12th January 2023*).

The Fund invests globally in companies that Qblue believes contribute positively to social and environmental factors. The Fund has a data driven and systematic investment process with a strong focus on sustainability. Qblue's in-house proprietary investment framework, The Sustainability Cube™, systematically builds a portfolio of companies located around the world that have been identified as sustainability leaders in their respective field. High scores are achieved if a company can deliver long term profitability while succeeding in meeting three sustainability dimensions: ESG Industry Leadership, Climate Transition Readiness and SDG Alignment. For more information please click [here](#).

Past performance is no guide to future performance and the value of investments and income from them can fall as well as rise.

About Heptagon Capital

London-based Heptagon Capital was founded in 2005 by former Morgan Stanley directors, including Eran Ben-Zour, Tarek Mooro and Fredrik Plyhr, and provides Institutional and Ultra High Net Worth investors creative, class-leading investment opportunities across traditional and alternative asset classes. Heptagon's \$5.8bn Irish UCITS fund umbrella includes funds managed in-house and sub-advised funds managed by well-established third-party managers. Click [here](#) to visit our website.

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About Qblue Balanced

Qblue Balanced, is a Copenhagen-based boutique investment firm founded in 2018 by financial services veteran, Bjarne Graven Larsen who has more than 30 years of experience in the industry. He is the former Chief Investment Officer and executive board member of Ontario Teachers' Pension Plan (OTPP), one of the world's largest pension plans, headquartered in Toronto. Prior to that, Bjarne was the Chief Investment Officer and executive board member of ATP, Denmark's largest and Europe's fourth largest pension fund. Qblue was founded on a distinct idea and philosophy, 'to help institutional investors achieve their investment objectives by providing sustainable solutions to obtain more diversified, more robust portfolio construction designs'.

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