



LOMBARD ODIER
INVESTMENT MANAGERS

PRESS RELEASE

London, 4th July, 2024

Lombard Odier Investment Managers appointed by Wiltshire Pension Fund for sustainable equity mandate

Planetary Transition fund selected to fulfil listed equities allocation

Lombard Odier Investment Managers ('LOIM') has been appointed by Wiltshire Pension Fund to manage a mandate that invests in global sustainable equities, consistent with the transition towards a net-zero economy, and which seeks to deliver competitive financial returns and positive environmental impact for Wiltshire's members¹.

Wiltshire Pension Fund is part of the national Local Government Pension Scheme (LGPS), currently representing over 86,000 members with more than £3.2bn in assets under management. Wiltshire has selected LOIM's Planetary Transition strategy to fulfil the listed equity allocation of their Climate Opportunities (Clops) portfolio.

The Planetary Transition fund is an active equities strategy that invests in companies that are driving the transition to net zero. The mandate win is a further endorsement of LOIM's expertise and credentials in sustainable investing in the UK institutional market, following the appointment by Nest for a £5 billion global thematic equity mandate earlier this year.

Ritesh Bamania, Head of UK Institutional Sales and Global Consultant Relations at LOIM, said: "We are delighted that Wiltshire Pension Fund has chosen to partner with LOIM. Both Wiltshire and Lombard Odier share the conviction that sustainability trends can drive returns in active equities. Our Planetary Transition strategy seeks to deliver compelling active returns by selecting companies that will benefit as the net zero transition unfolds in areas such as climate and nature."

Jennifer Devine, Head of Wiltshire Pension Fund, commented: "We are very excited to be partnering with Lombard Odier as part of our Climate Opportunities (Clops) portfolio. We believe that Lombard Odier's Planetary Transition strategy is a great fit for Clops, aligning well with our investment philosophy. Lombard Odier's use of planetary boundaries, system roadmaps and deep investment research will ensure Wiltshire Pension Fund are invested in companies that are driving the transition to net zero while providing sustainable investment returns."

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About Lombard Odier IM

Lombard Odier Investment Managers (LOIM) is the institutional asset management business of the Lombard Odier Group, wholly owned and funded by its partners since its establishment in 1796.

We provide a range of investment solutions to a diverse group of long-term oriented clients. Our heritage, and our combination of the best of conservatism and innovation, keeps us well positioned to create lasting value for our clients. Our investment capabilities span fixed income, convertible bonds, equities, multi-asset, and alternatives. Sustainability is central to our investment philosophy; we believe it is the founding principle of long-term economic and investment outcomes and will drive returns over the long term.

With 209 investment professionals, we are a global business with a network of 13 offices across Europe, Asia and North America and have assets under management of CHF 62 billion (as at 31 December 2023).

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