



**ODDO BHF**  
ASSET MANAGEMENT



MAKE  
*every day*  
AN OPPORTUNITY

May 2022

# A *sustainable* INVESTMENT APPROACH

As a leading asset manager in Europe, we provide investment solutions in equities, bonds and asset allocation to **institutional clients and distribution partners**.

Our investment style is characterized by **an active and long-term investment approach**.

Our conviction? Responsible investing is **a business imperative** that makes us more effective at finding sustainable opportunities and generates better outcomes.

€ 62bn

assets under management

2/3

of our mutual fund assets integrate ESG criteria

1/4

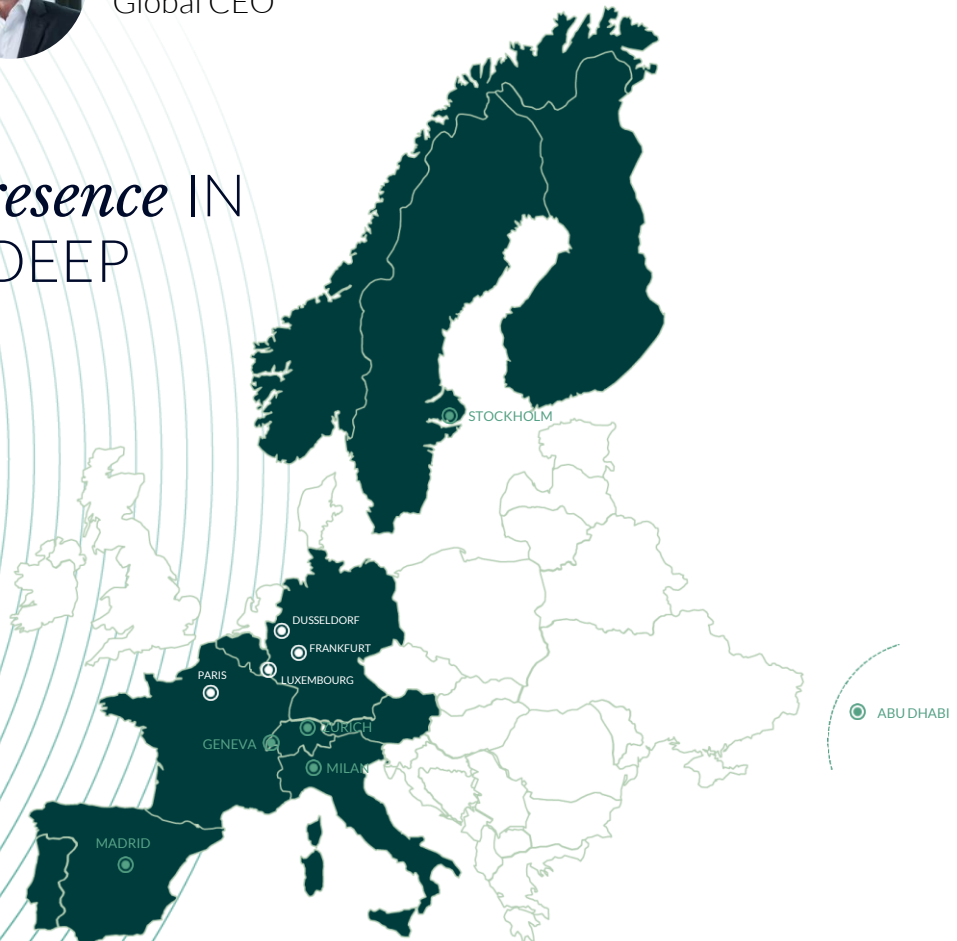
of our mutual fund assets have been awarded a sustainability label

*Stable and experienced management teams, transparent investment processes are all assets that forge our identity.*



NICOLAS CHAPUT  
Global CEO

OUR *strong local presence* IN EUROPE GIVES US DEEP MARKET INSIGHT



# OUR INVESTMENT *expertise*

Our objective : To outperform the markets in order to create **long-term value** for our clients. To achieve this, we place financial and extra-financial analysis at the heart of our investment strategies.

## FUNDAMENTAL EQUITY

Aim to generate outperformance based on fundamental analysis

## THEMATIC EQUITY

Adopt a long-term view, grounded in the trends that are deeply transforming our societies

## QUANTITATIVE EQUITY

Use models in order to seek to generate performance under a strict risk management approach

## MULTI-ASSET

Design the best combination of asset classes according to clients' needs with a dynamic allocation

## FIXED INCOME

Aim to deliver income-oriented solutions through fundamental credit analysis in all market environments

## SUSTAINABLE INVESTMENT

Delivering long-term value through integration of ESG criteria

## Selected FUNDS

Funds	Ratings <sup>(1)</sup>	Risk profile <sup>(2)</sup>	Labels	SFDR classification
<b>Equities</b>				
<b>ODDO BHF Avenir Euro</b> Invest in tomorrow's leading companies	★★★ <sup>(3)</sup>	①②③④⑤⑥⑦		6 8 9
<b>ODDO BHF Active Small Cap</b> Find out the market's hidden champions	★★★★ <sup>(4)</sup>	①②③④⑤⑥⑦		6 8 9
<b>ODDO BHF Artificial Intelligence</b> Participate in the Artificial Intelligence silent revolution	★★ <sup>(5)</sup>	①②③④⑤⑥⑦		6 8 9
<b>ODDO BHF Green Planet</b> Play an active role in the ecological transition	-	①②③④⑤⑥⑦		6 8 9
<b>METROPOLE Sélection</b> Responsible Value investment	★★ <sup>(6)</sup>	①②③④⑤⑥⑦		6 8 9
<b>ODDO BHF Algo Sustainable Leaders</b> Setting the stage for a sustainable future	★★★★★ <sup>(7)</sup>	①②③④⑤⑥⑦		6 8 9
<b>Fixed Income</b>				
<b>ODDO BHF Sustainable Euro Corporate Bond</b> A sustainable selection of investment grade bonds	★★★ <sup>(8)</sup>	①②③④⑤⑥⑦		6 8 9
<b>ODDO BHF Global Credit Short Duration</b> The income of short maturity bonds	★ <sup>(9)</sup>	①②③④⑤⑥⑦		6 8 9
<b>ODDO BHF Sustainable Credit Opportunities</b> Flexible across all fixed income segments	★★★★ <sup>(10)</sup>	①②③④⑤⑥⑦		6 8 9
<b>Multi-Asset</b>				
<b>ODDO BHF Polaris Moderate</b> Stay on course with a moderate approach	★★★★★ <sup>(11)</sup>	①②③④⑤⑥⑦		6 8 9
<b>ODDO BHF Polaris Balanced<sup>(15)</sup></b> Stay on course with a balanced approach	★★★★ <sup>(12)</sup>	①②③④⑤⑥⑦		6 8 9
<b>ODDO BHF Polaris Dynamic<sup>(15)</sup></b> Stay on course with a dynamic approach	★★★★★ <sup>(13)</sup>	①②③④⑤⑥⑦		6 8 9
<b>ODDO BHF Polaris Flexible</b> Stay on course with a flexible approach	★★★★★ <sup>(14)</sup>	①②③④⑤⑥⑦		6 8 9

**Past performance is not a reliable indication of future return and is not constant over time. These funds are subject to one or more of the following risks: equity market risk, capital loss, interest rate risk, discretionary management risk, high yield risk.**

(1) Copyright© Morningstar, Inc. All Rights Reserved. - (2) The risk profile is not constant and may vary over time. The lowest category does not mean a risk-free investment. Historical data, such as is used to calculate the risk/return ratio, may not be a reliable indication of the future risk profile of the Fund. There is no guarantee that the management objectives in terms of risk and return will actually be met. - (3) CR-EUR share class, Morningstar category: Euro Zone Mid-Cap Equity - (4) CR-EUR share class, Morningstar category: Europe Small-Cap Equity - (5) CR-EUR share class, Morningstar category: Sector Equity Technology - (6) A-EUR shares, Morningstar category: Europe Large-Cap Value Equity - (7) CRW-EUR share class, Morningstar category: Europe Large-Cap Blend Equity - (8) CR- EUR share class, Morningstar category: EUR High Yield Bond - (9) CR- EUR share class, Morningstar category: Global High Yield Bond - EUR Hedged - (10) CR-EUR share class, Morningstar category: EUR Flexible Bond - (11) DRW EUR share class, Morningstar category : EUR Cautious Allocation - (12) DRW EUR share class, Morningstar category: EUR Moderate Allocation - Global - (13) DRW EUR share class, Morningstar category: EUR Aggressive Allocation - (14) Parts DRW EUR, Morningstar category: EUR flexible Allocation - (15) Sub-fund of the umbrella (FCP) "ODDO BHF Exklusiv" - Source: ODDO BHF AM, all data as of 31/01/2021 unless otherwise stated.

# ODDO BHF GROUP

## An *entrepreneurial adventure* CONTINUOUSLY REAFFIRMED OVER THE GENERATIONS

We are fortunate to have more than **60,000 clients**, institutional investors, companies, distribution partners and large private clients whose financial assets we advise, manage, and invest for a total amount of **142 billion euros**.

Our mission is to grow these assets through our four businesses:

PRIVATE WEALTH  
MANAGEMENT

ASSET MANAGEMENT

CORPORATES & MARKETS

ASSET SERVICING

## A UNIQUE *partnership structure*

We aim to align our interests and values with those of our clients, as we design for them responsible solutions in line with their aspirations and those of our societies.



65% Odde family  
25% Employees  
10% Other

## CONTACT



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**ODDO BHF Asset Management SAS (France)** Portfolio management company approved by the Autorité des Marchés Financiers under GP 99011.

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