

# **iM Global Partner launches new UCITS funds with legendary New York investor Richard Bernstein**

Paris, New York - January 24<sup>th</sup>, 2022. iM Global Partner announces today the launch of two new UCITS funds with its strategic partner - Richard Bernstein Advisors (RBA) of New York.

RBA, a renowned asset allocation specialist and among the largest ETF strategists in the U.S., is now bringing its capabilities to European investors. The firm runs a range of top-down asset allocation strategies invested in ETFs with a look-through approach into their underlying securities.

The company was founded by respected investment expert, Richard Bernstein, who has 40 years of experience in the markets and was formerly the chief investment strategist at Merrill Lynch. Inducted to Institutional Investor's Hall of Fame, Mr Bernstein is also the author of two books on investing: 'Style Investing' and 'Navigate the Noise'. The senior research team at RBA have an average of 22 years of industry experience, and some of them have been working with Richard since his Merrill Lynch days.

## **iMGP Global Risk-Balanced**

The **iMGP Global Risk-Balanced** fund follows the same successful strategy used by RBA in the USA\* and is based on the investment philosophy implemented by Rich's team since the mid-nineties

RBA's flagship "RBA Global Risk-Balanced Moderate ETF Strategy", now implemented in the **iMGP Global Risk-Balanced** fund, has a moderate long-term neutral policy set at 50% of equities, which may deviate by +/-25% around the main asset class weights should the investment team have a high conviction on these markets.

This 'go anywhere' multi-asset strategy can invest in any sector, market capitalization, duration, credit, style or country/region.

RBA calls its investment approach "Pactive®" investing because it uses passive tools like ETFs to take an active view on markets.

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**Richard Bernstein, CIO and CEO of Richard Bernstein Advisors** commented: “US investors have found RBA’s Pactive® strategies extremely beneficial to portfolio diversification and overall performance. Accordingly, we are very excited about now being able to offer our strategies to non-US investors”.

**Jamie Hammond, Deputy CEO & Head of EMEA with iM Global Partner** said: “RBA has a time-tested, proven asset allocation process that has delivered for investors since 2010. The new **iMGP Global Risk-Balanced** fund will bring this expertise to EMEA based investors, for the first time, in a UCITS structure. Given its ‘go-anywhere’ capability, the fund will sit in the Morningstar Flexible Allocation sector, which has proven to be very popular with investors throughout the EMEA region”.

### **iMGP Responsible Global Moderate**

The **iMGP Responsible Global Moderate** fund combines RBA’s asset allocation framework with the integration of ESG factors in the implementation tools: a minimum of 75% of the ETFs it invests in must be classified Article 8 or 9 according to SFDR. This positions the fund itself as SFDR Article 8.

The strategic asset allocation breakdown for the fund is 50% fixed income and 50% equities.

**Philippe Uzan, CEO, CIO Global Asset Management** said: “We are delighted to offer to our clients this new investment solution managed by Richard Bernstein Advisors. The rapidly expanding universe of ESG UCITS ETFs has enabled us to expand RBA’s traditional approach into the Responsible investment area.”

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### **About RBA - Richard Bernstein Advisors**

Richard Bernstein Advisors LLC is an independent registered investment manager. RBA manages ETF asset allocation SMA portfolios at Merrill Lynch, Morgan Stanley, Ameriprise, UBS, Envestnet, and other select RIA platforms and also manages assets on behalf of several large institutional investors. RBA had \$15.7bn in assets under management and advisement as of end December 2021. RBA's investment insights as well as further information about the firm and products can be found at [www.rbadvisors.com](http://www.rbadvisors.com)

Learn more about RBA here: <https://www.imgp.com/en/our-partners/richard-bernstein-advisors>

\*Past performance is no indicator of future performance

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### **About iM Global Partner**

iM Global Partner is a worldwide asset management network. It selects and builds long-term partnerships with talented and independent asset management companies through direct capital ownership. iM Global Partner is present in 16 locations across Europe and the United States and provides its clients with access to the best management strategies of its Partners. It represents around US\$38 billion of assets under management as of end December 2021.

[imgp.com](http://imgp.com)

### **Existing Partners with iM Global Partner**

**Polen Capital** - US & Global growth equities, Partner since 2015

**Dolan McEniry** - US credit, Partner since 2016

**Sirios** - US long/short equities, US credit, Partner since 2018

**Dynamic Beta investments** - Liquid alternatives, Partner since 2018

**Scharf Investments** - US value equities, Partner since 2019

**Zadig Asset Management** - European equities, Partner since 2020

**Richard Bernstein Advisors** - Global asset allocation, Partner since July 2021

**Asset Preservation Advisors** - US municipal bonds, Partner since September 2021

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