

# PRESS RELEASE

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## Spuerkeess and Erste Asset Management join forces to promote sustainable financial solutions in Luxembourg

**Spuerkeess and Erste Asset Management, the asset management company of the Austria Erste Group, announce a strategic partnership. This collaboration highlights the commitment of both companies to promoting and offering its clients investment solutions that consider sustainability challenges.**

As part of this exclusive partnership, Spuerkeess becomes the sole distributor of Erste Asset Management's sustainable investment funds in Luxembourg. These funds provide investors with the opportunity to combine financial returns with environmental and social criteria. Spuerkeess will thereby strengthening its position in sustainable and responsible finance while the, with several sustainability labels awarded, funds of Erste Asset Management will be available to clients in the Luxembourg market for the first time.

*"I would like to thank Erste Group for launching our partnership allowing Spuerkeess to offer a new range of sustainable investment opportunities to its customers. Our clients can be assured that their investments not only support their financial future but also actively contribute to addressing global challenges",* says **Romain Wehles, Chief Commercial Officer at Spuerkeess**

### Sustainability at the heart of our mission

Erste AM has been one of the pioneers in sustainable investing in the German-speaking region for more than 20 years with a total ESG fund volume as of 31,9 bn Euro (data per 31.03.2025). Strict minimum criteria that consider all ESG (Environmental, Social and Governance) factors and a specially developed sustainability score to evaluate companies are the hallmarks of Erste AM's investment approach. A dedicated Responsible Investments team analyzes companies in terms of sustainability factors and contacts companies in the form of engagements to help them move towards a more sustainable path.

The sustainable philosophy is also underpinned by external certifications and labels. In addition, Erste AM has developed its own ESGenius Score model to assess the sustainability performance of companies and countries. In the future, Spuerkeess customers will be able to benefit from the extensive know-how and decades of experience of Erste AM in the field of sustainable investing.

**Thomas Kraus, Member of the Executive board of Erste AM** says: *"We are convinced that our well-established sustainable investment process, developed over decades of dedicated work, will add significant value to the customers of Spuerkeess, while addressing the numerous climate and environmental challenges our planet faces".*

### Funds for a sustainable future

As part of the partnership, Spuerkeess has selected some of Erste Asset Management's sustainable funds in the following categories:

**ESG funds:** These funds, classified as "Article 8" under the SFDR Regulation\*, are designed to promote environmental and social characteristics. This is achieved through Erste Asset Management's proprietary



methodology, ensuring enhanced ESG (Environmental, Social and Governance) integration in investment selection and minimizing sustainability risks.

- ERSTE RESPONSIBLE STOCK DIVIDEND
- ERSTE RESPONSIBLE STOCK GLOBAL

**Impact Funds:** As part of the cooperation, Spuerkeess customers will also be able to purchase Impact funds. These funds, classified as “Article 9” under the SFDR Regulation\*, are designed not only to generate financial returns but also to create a positive impact on the environment and society. This is achieved through Erste Asset Management’s proprietary methodology, which seeks to select investments that contribute positively to one or more environmental and social objectives.

- ERSTE FAIR INVEST
- ERSTE RESPONSIBLE BOND GLOBAL IMPACT

*\*Regulation (EU) 2019/2088 of November 27, 2019, on sustainability-related disclosures in the financial services sector.*

### Together for sustainable finance

The partnership between Spuerkeess and Erste Asset Management marks a significant milestone in Spuerkeess’ overall sustainability strategy. The goal is to offer clients solutions that align with both their financial and sustainability objectives. For more information on Spuerkeess’ sustainability initiatives and investment solutions, please visit: [www.spuerkeess.lu/fonds-durables-Erste-AM](http://www.spuerkeess.lu/fonds-durables-Erste-AM). Read more about the sustainable investment philosophy of Erste AM at: <https://www.erste-am.at/en/private-investors/sustainability>.

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## About Spuerkeess

Since its founding in 1856, Spuerkeess has been wholly owned by the Luxembourg State. The Bank's statutory missions are to promote savings, facilitate access to housing, and support the development of the national economy. Today, Spuerkeess is both the leader in the domestic retail banking and SME markets and a universal and systemic bank, recognized well beyond the borders of the Grand Duchy of Luxembourg. International rating agencies have awarded it AA+ (Standard & Poor's) and Aa2 (Long-term Deposit Rating, Moody's).

In 2024, Spuerkeess was honoured with the "Randstad Employer Brand Research Award" and received the title of "Best Investment Bank & Sustainable Finance Luxembourg" at the Global Finance "Sustainability Awards." Additionally, Sia Consulting concluded that S-Net is considered the best banking application in Luxembourg.

More information at: [www.spuerkeess.lu](http://www.spuerkeess.lu)

## About Erste Asset Management

Erste Asset Management GmbH (Erste AM) is an international asset manager with a strong position in Central and Eastern Europe. Erste Asset Management is backed by the financial strength of Erste Group Bank AG (Erste Group). At its locations in Austria, Germany, Croatia, Romania, Slovakia, the Czech Republic and Hungary, Erste AM manages assets of around EUR 92.5 billion (per March 2025). Erste Asset Management has been successfully operating in the market since 1965.

## Important legal notes

This document is an advertisement. Please refer to the prospectus of the UCITS or to the Information for Investors pursuant to Art 21 AIFMG of the alternative investment fund and the Key Information Document before making any final investment decisions. Unless indicated otherwise, source: Erste Asset Management GmbH. Our languages of communication are German and English.

The prospectus for UCITS (including any amendments) is published in accordance with the provisions of the InvFG 2011 in the currently amended version. Information for Investors pursuant to Art 21 AIFMG is prepared for the alternative investment funds (AIF) administered by Erste Asset Management GmbH pursuant to the provisions of the AIFMG in connection with the InvFG 2011. The fund prospectus, Information for Investors pursuant to Art 21 AIFMG, and the Key Information Document can be viewed in their latest versions at the web site [www.erste-am.com](http://www.erste-am.com) within the section mandatory publications or obtained in their latest versions free of charge from the domicile of the management company and the domicile of the custodian bank. The exact date of the most recent publication of the fund prospectus, the languages in which the Key Information Document is available, and any additional locations where the documents can be obtained can be viewed on the web site [www.erste-am.com](http://www.erste-am.com). A summary of investor rights is available in German and English on the website [www.erste-am.com/investor-rights](http://www.erste-am.com/investor-rights) as well as at the domicile of the management company.

The management company can decide to revoke the arrangements it has made for the distribution of unit certificates abroad, taking into account the regulatory requirements.

Detailed information on the risks potentially associated with the investment can be found in the fund prospectus or Information for investors pursuant to Art 21 AIFMG of the respective fund. If the fund currency is a currency other than the investor's home currency, changes in the corresponding exchange rate may have a positive or negative impact on the value of his investment and the amount of the costs incurred in the fund - converted into his home currency.

Our analyses and conclusions are general in nature and do not take into account the individual needs of our investors in terms of earnings, taxation, and risk appetite. Past performance is not a reliable indicator of the future performance of a fund.

