

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



SPUERKEESS

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. Read more about the sustainable investment philosophy of Erste AM at: <https://www.erste-am.at/en/private-investors/sustainability>.