

News Release

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Columbia Threadneedle Investments partners with UBS on Japan Equities strategy

- *Columbia Threadneedle Investments partners with UBS Global Wealth Management to offer a three-month exclusive to clients in Asia, until end of August 2024.*
- *The strategy with a core investment style aims to focus on generating long-term capital growth for investors by investing in a high conviction portfolio of quality Japanese companies.*
- *The strategy is based on strong fundamental research, supplemented by quantitative, macroeconomic assessment tools and responsible investment framework.*
- *The Japan Equities team has a track record of over 10 years delivering strong long-term performance.*

SINGAPORE – 11 June 2024 - Columbia Threadneedle Investments, a leading global asset management group, has partnered with UBS Global Wealth Management (GWM) on the exclusive launch of its Japan Equities strategy, managed by Daisuke Nomoto, Columbia Threadneedle's Global Head of Japanese Equities. The strategy aims to generate alpha from stock selection across the whole market cap spectrum. Having managed the strategy for over ten years, the exclusive launch now brings Daisuke's track record of strong long-term outperformance to UBS GWM clients for the next three months across select markets in Asia.

The Japan Equities strategy has a core investment style with a bias towards quality and focuses on companies with durable competitive advantages. The investment strategy is driven by Columbia Threadneedle's fundamental research and enhanced by quantitative, macroeconomic assessment and responsible investment frameworks. The primary source of alpha is from stock selection, validating the team's approach as bottom-up stock pickers. Daisuke Nomoto has 30 years' experience and leads a team of five portfolio managers with an average of 20 years of investment experience. The stability of the Japan Equities team provides a solid backdrop for the repeatability of the investment process.

Jansen Phee, Head of Funds Investment Solutions Asia Pacific and Head Global Investment Management China at UBS Global Wealth Management, commented: “Working in partnership, we are pleased to bring our clients exclusive access to a strategy that has proven long-term outperformance in Japanese Equities. This is a testimonial to the strength and uniqueness of UBS’s shelf of products and offerings we offer to our clients in our region.”

Daisuke Nomoto, Global Head of Japanese Equities at Columbia Threadneedle Investments said: “I am bullish on Japan. I believe it now offers a deep investment universe of high-quality companies that can potentially generate sustainable earnings growth. For me, Japan has five positive ‘lows’, which I do not believe can be found in other equity markets, these are: low leverage in the corporate balance sheets, low interest rates, low valuations, low expectations for reforms and low retail allocation to equities. All these characteristics are supportive of the price of risk assets. In the current environment, I see Japan as a golden opportunity and believe investors should look to take advantage.”

Jon Allen, Head of Asia Pacific at Columbia Threadneedle Investments, added: “We continue to see strong appetite for our Japan Equities strategy from wholesale and institutional clients, having raised almost \$500m in recent months. With the positive climate for Japanese equities, I believe that this is an optimum time to expand the strategy led by Daisuke Nomoto and are delighted to partner with UBS GWM exclusively for the next three months to help fulfil the demand seen from their clients.”

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About Columbia Threadneedle Investments

Columbia Threadneedle Investments is a leading global asset manager, entrusted with US\$652bn / €604bn / £516bn¹ on behalf of individual, institutional and corporate clients around the world.

We have more than 2500 people including over 650 investment professionals based in North America, Europe and Asia². We offer our clients a wide range of strategies across equities, fixed income and alternatives, as well as specialist responsible investment capabilities and a comprehensive suite of solutions.

Columbia Threadneedle Investments is the global asset management group of Ameriprise Financial, Inc. (NYSE:AMP), a leading US-based financial services provider. As part of Ameriprise, we are supported by a large and well-capitalised diversified financial services firm.

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¹ Ameriprise Q1 2024 results

² As at 31 March 2024, Columbia Threadneedle Investments

About UBS

UBS is a leading and truly global wealth manager and the leading universal bank in Switzerland. It also provides diversified asset management solutions and focused investment banking capabilities. With the acquisition of Credit Suisse, UBS manages 5.7 trillion dollars of invested assets as per fourth quarter 2023. UBS helps clients achieve their financial goals through personalized advice, solutions and products. Headquartered in Zurich, Switzerland, the firm is operating in more than 50 markets around the globe. UBS Group shares are listed on the SIX Swiss Exchange and the New York Stock Exchange (NYSE).

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