

# News Release

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## **COLUMBIA THREADNEEDLE EXPANDS EUROPEAN EQUITY RANGE WITH THE LAUNCH OF PAN EUROPEAN FOCUS SICAV**

**LONDON – 16 January 2025** Columbia Threadneedle Investments, the leading global asset management group, has expanded its offering for European investors with the launch of the CT (Lux) Pan European Focus<sup>1</sup>, which will be managed by Frederic Jeanmaire who is A-rated by Citywire<sup>2</sup> and a Trustnet Alpha Manager<sup>3</sup>.

The CT (Lux) Pan European Focus will follow the same approach and philosophy that Frederic uses for the successful Pan European Focus Strategy, which he has managed since 2014 and is 5-star rated by Morningstar. The Strategy has built a strong track record, returning 193% since he took over, outperforming its benchmark, the MSCI Europe Index, by 91%<sup>4</sup>.

The new CT (Lux) Pan European Focus invests in 30-40 holdings, producing a concentrated portfolio of European and UK companies. Frederic seeks business models that score highly on the Porter's Five Forces framework – a model the team has used successfully across other strategies in its European and Global equities range. The team focuses on businesses that are undergoing transformation and are compounding returns.

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<sup>1</sup> From 12 December 2024, as well as the changes to the investment objective and policy, the name of the CT (Lux) Pan European Equity Dividend has changed to CT (Lux) Pan European Focus

<sup>2</sup> <https://citywire.com/wealth-manager/manager/frederic-jeanmaire/d28367>

<sup>3</sup> <https://www.trustnet.com/fundswire/13293978/frederic-jeanmaire-retains-fe-trustnet-alpha-manager-rating>

<sup>4</sup> MSCI Europe Index returned 102% since August 2014 – full annualized performance number in notes to editors

**Frederic Jeanmaire, manager of CT (Lux) Pan European Focus**, said: “Our selective approach aims to uncover and invest in unique businesses, that drive strong growth and sustain exceptional returns on capital. We aim to continue delivering superior risk-adjusted returns to investors.”

**Florian Uleer, Head of Europe and Middle East Distribution, at Columbia Threadneedle Investments**, commented: “We believe in the value of active management, and this fund is a prime example of how a well-thought-out investment process can deliver outperformance for our clients. Frederic has successfully navigated challenging markets over the last ten years and built a strong track record and going forward we believe this fund has the potential to deliver strong risk-adjusted returns for our clients.

“I’m pleased to be able to bring this established investment strategy to our European-based investors via a SICAV vehicle.”

**END**

## Notes to Editors

### About the CT (Lux) Pan European Focus

- **Structure:** UCITS, Luxembourg SICAV
- **Fund base currency:** EUR
- **Minimum investment:**
  - EUR 1,500,000 (Class Z (Platforms))
  - EUR 100,000 (Class I (Institutional))
- **Estimated Ongoing Charges Figure:**
  - 0.90% (Class Z)
  - 0.60% (Class I)

*(Please see prospectus for all available share classes)*

The Fund is registered in Luxembourg, Austria, Belgium, Denmark, Finland, France, Germany, Italy, Netherlands, Norway, Portugal, Spain, Sweden, Switzerland and UK.

### Pan European Focus Strategy Performance:

	2023	2022	2021	2020	2019	2018	2017	2016	2015	2014
<b>Strategy</b>	19.6	-7.6	14.5	14.1	34.3	-5.8	16.1	0.3	15.9	0.1
<b>Target Benchmark</b>	13.9	-3.8	18.0	2.7	19.8	-9.0	15.3	19.5	3.3	0.2

### About Columbia Threadneedle Investments

Columbia Threadneedle Investments is a leading global asset manager, entrusted with US\$672bn / €602bn / £501bn<sup>5</sup> on behalf of individual, institutional and corporate clients around the world.

We have more than 2500 people including approximately 650 investment professionals based in North America, Europe and Asia<sup>6</sup>. 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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**Columbia Threadneedle Investments is the global brand name of the Columbia and Threadneedle group of companies.**

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<sup>5</sup> Ameriprise Q3 2024 results

<sup>6</sup> As at 30 September 2024, Columbia Threadneedle Investments