

# News Release

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## Columbia Threadneedle Investments launches the CT (Lux) Japan Equities fund

- *The CT (Lux) Japan Equities fund has a fundamental driven investment process supplemented by quantitative, ESG, and macro economic assessment tools*
- *The Fund will focus on generating a long-term capital growth for investors by investing in a concentrated portfolio of quality Japanese companies*
- *The Japan Equities team has a proven track record of generating excess returns from stock selection across the whole market capitalisation spectrum*

**LUXEMBOURG** – 14 Dec 2023 - Columbia Threadneedle Investments, a leading global asset management group, launched today the CT (Lux) Japan Equities fund (the “Fund”), classified as Article 8 according to the EU’s Sustainable Finance Disclosure Regulation (SFDR) and available to European investors. The Fund, managed by Daisuke Nomoto, Columbia Threadneedle’s Global Head of Japanese Equities, aims to generate alpha from stock selection across the whole market cap spectrum. Having managed Japanese equities strategies for over ten years, the launch brings Daisuke’s track record of strong long-term outperformance to European investors.

The CT (Lux) Japan Equities fund is the latest addition to Columbia Threadneedle’s equities offering. The strategy has a core investment style with a bias towards quality and focuses on companies with a high or improving return on invested capital.

The Fund’s investment strategy is driven by Columbia Threadneedle’s fundamental research, and enhanced by our quantitative, ESG and macro economic assessment frameworks. The majority of alpha since the strategy’s inception has been added through stock selection - validating our 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.

**Daisuke Nomoto, Portfolio Manager of the CT (Lux) Japan Equities Fund** said: “The Japanese corporate model has shifted in the last decade, now corporates are focusing on investor returns and capital efficiency. In 2021 we saw a higher dividend yield in Japan in comparison to the global average. Companies are investing their excess cash into human capital, research and development, allowing inorganic and organic investment opportunities. They are also increasingly focusing on investor returns and capital efficiency, and many are improving their share buybacks and dividend payments. This compounding of corporate activity against the current backdrop of inflation should be a positive driver going forward.”

**Michaela Collet Jackson, Head of Distribution, EMEA, at Columbia Threadneedle Investments**, said: “We have seen a recent strong appetite for our Japan strategy in our OEIC fund, with the positive climate for Japanese equities, I believe that this is an optimum time to expand the strategy lead by Daisuke Nomoto to our SICAV offering to fulfil the demand from our European and Asian clients. He launched his strategy in 2012 and now heads a five-strong Japanese Equities team based in Boston and London; his team has not had any departures, which gives a great stability and consistency to the strong track record of its investment process.”

END

#### **Notes to Editors:**

##### **About the CT (Lux) Japan Equities**

**Structure:** UCITS, Luxembourg SICAV

**ISIN:** LU2656572224 (ZJ JPY)

**SFDR:** Article 8

##### **Minimum investment:**

USD \$2,000,000 (Class Z (Platforms))

USD \$100,000 (Class I (Institutional))

USD \$2,500 (Class A (Retail))

**Base currency:** JPY

**Average number of securities:** 30-60

##### **Estimated Ongoing Charges Figure:**

0.85% (Class Z)

0.70% (Class I)

1.60% (Class A)

(Please see prospectus for all available share classes)

Registration details: Initially registered in Luxembourg, the Fund is intended for distribution across other markets subject to regulatory approval.

## About Columbia Threadneedle Investments

Columbia Threadneedle Investments is a leading global asset manager, entrusted with US\$587bn / €554bn / £481bn<sup>1</sup> 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 Asia<sup>2</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.

<http://www.columbiathreadneedle.com>

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Columbia Threadneedle (Lux) I, are Luxembourg domiciled investment companies with variable capital ("SICAV"), managed by Threadneedle Management Luxembourg S.A.

The SICAV's current Prospectus, the Key Investor Information Document (KIID)/Key Information Document (KID) and the summary of investor rights are available in English and/ or in local languages (where applicable) from the Management Company Threadneedle Management Luxembourg S.A., International Financial Data Services (Luxembourg) S.A., your financial advisor and/or on our website [www.columbiathreadneedle.com](http://www.columbiathreadneedle.com). Threadneedle Management Luxembourg S.A. may decide to terminate the arrangements made for the marketing of the SICAV. These documents are available in Switzerland from the Swiss Representative and Paying Agent CACEIS Investor Services Bank S.A., Esch-sur-Alzette, Zurich Branch, Bleicherweg 7, CH 8027 Zurich. Pursuant to article 1:107 of the Act of Financial Supervision, the sub-fund is included in the register that is kept by the AFM. Threadneedle (Lux) is authorised in Spain by the Comisión Nacional del Mercado de Valores (CNMV) and registered with the relevant CNMV's Register with number 177. Past performance is calculated according to the BVI method in Germany.

**In the EEA and Switzerland:** Issued by Threadneedle Management Luxembourg S.A. registered with the Registre de Commerce et des Sociétés (Luxembourg), Registered No. B 110242, 44 rue de la Vallée, L-2661 Luxembourg, Grand Duchy of Luxembourg.

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<sup>1</sup> Source: Ameriprise Financial Q3 2023 earnings release

<sup>2</sup> As at 30 September 2023, Columbia Threadneedle Investments

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