

## Merger of Artico Partners AG and Serafin Asset Management AG

- Artico team becomes part of Serafin Asset Management
- Expansion of analytical expertise through many years of successful systematic investment process
- Global products and emerging markets equity expertise added to the portfolio
- Sustainable funds with high ESG ratings and SFDR classification by Article 9

**Zug, May 21, 2024:** [Serafin Asset Management](#) ("Serafin AM") acquired a majority stake in the Swiss asset manager Artico Partners AG, Zurich, in spring last year. In March of this year, the stake was increased to 100%. With the merger now completed, the existing Artico team will be integrated into Serafin Asset Management AG, Zug, and will remain responsible for the Artico Sustainable Equity Funds it manages. Nothing will change for existing clients and in the activities and responsibilities related to the Artico funds. Thanks to the integration, Serafin AM also expects to benefit from the further strengthening of its investment expertise and client activities. As a result of the merger, Serafin Asset Management AG now has a branch in Zurich.

The Artico team is the specialist for sustainability within Serafin Asset Management. The systematic investment approach combines traditional fundamental analysis with a balanced ESG strategy and a clear decarbonization target. As a signatory to the UN Principles for Responsible Investment (UN PRI), Serafin AM is committed to the six principles of the PRI. In line with the Paris Climate Agreement, Artico Sustainable Equity Funds pursue a sustainable investment objective that results in funds with a low carbon footprint. All Artico Sustainable Equity Funds are classified as Article 9 (SFDR). With an excellent track record, well above the usual benchmarks, two funds have been awarded 5 stars by Morningstar for performance over 10 years.

Silvio Halsig, co-founder of Serafin Asset Management, comments on the merger: "With the full acquisition of Artico Partners AG, we reach a milestone by adding a systematic core approach to our best-in-class satellite investment solutions for asset managers. Our new Artico core funds provide access to emerging and global markets with a focus on decarbonization and quality. We are confident that this acquisition will not only enhance our offering but also strengthen our position as an asset management boutique for the wealth management industry. We remain committed to our goal of delivering superior results and unparalleled service to our valued clients."

Gabriel Herrera, founder and CEO of Artico Partners AG: "As part of the Serafin Asset Management Group, our team has already been able to work closely with our Serafin colleagues since April 2023. The legal integration enables us to further expand this cooperation in our day-to-day business."

## About Serafin Asset Management GmbH

Serafin Asset Management GmbH is an independent asset manager headquartered in Frankfurt am Main that brings together experts from the financial and tech sectors. The BaFin-regulated securities company offers specialized investment solutions for different market cycles that enable additional resilience and growth. To this end, data and systematic processes are combined with the overview and diligence of fundamental investors. Serafin Asset Management GmbH currently employs more than 20 people from the fields of finance, mathematics, physics, and economics. The managing directors are Silvio Halsig, Dr. Philipp Moritz Hetzer, and Thorsten Ott.

The family-owned company Serafin Asset Management Holding GmbH was founded in 2021 by Philipp Haindl and Silvio Halsig. The Serafin Asset Management Group manages assets of around 800 million euros (as of March 31, 2024).

## About Serafin Asset Management AG

[Serafin Asset Management AG](#), headquartered in Zug/Switzerland, has been managing investment funds since 2004. The investment focus of the funds is on the investment themes "Equity", "Equity Alternatives" and "Macro". Serafin Asset Management AG has 21 employees, including 11 portfolio managers and analysts, is licensed by FINMA as a "manager of collective assets" and has branches in Lugano, Nyon, and Zurich.

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