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Bellevue Funds awarded Ecolabel certification from Austrian Minister Elisabeth Köstinger

On September 14, 2018, Bellevue Asset Management was officially awarded the Austrian Ecolabel for the BB Adamant Sustainable Healthcare Fund, its premier healthcare investment fund with a sustainable profile that was launched at the end of June. This award from the Austrian Ministry for Sustainability and Tourism is conferred for products and services with outstanding environmental and social profiles. To date, 50 investment funds from 14 providers have been certified with this Ecolabel (EL). Cyrill Zimmermann, Head of Healthcare Funds & Mandates at Bellevue Asset Management, accepted the award from Minister Elisabeth Köstinger in Vienna: “Today investors not only want their portfolios to generate the highest possible returns, they also want a mix of return potential and ethical investment vehicles.”

Healthcare has been one of Bellevue Asset Management’s core competencies for 25 years. The Swiss investment specialist employs more than 20 healthcare investment professionals who manage EUR 5.2 bn in various investment vehicles. Zimmermann and his team of experts long ago endorsed the Sustainable Development Goals of the United Nations, for instance Goal 3 of “ensuring healthy lives and promoting well-being for all at all ages.” With the launch of the BB Adamant Sustainable Healthcare Fund, Bellevue has introduced another pioneering



Dr. Cyrill Zimmermann, Head Healthcare Funds & Mandates, and Austrian Minister Elisabeth Köstinger

product that addresses the needs of discerning investors. The fund’s management team is supported by Sustainalytics, an internationally recognized ESG rating agency, for the analysis and evaluation of sustainability issues. Examples of sustainability in the healthcare industry are environmentally sound procurement policies for drug manufacturers, high safety standards for medical products and services, and a strong commitment to ethical clinical trials. Examples of sustainable healthcare priorities from a patient’s perspective are the early diagnosis of potentially fatal diseases such as HIV or cancer, personalized medicine and targeted therapies, and efficient treatment methods such as surgical robots and minimally invasive procedures. Another criterion concerns pricing policies: Medicines should be affordable for as much of the population as possible.

There are three key criteria that must be met under the EL directive for “green financial products”: The investment screening criteria must be well-suited for identifying companies or issuers that deliver veritable benefits to the environment and society at large. Quality standards pertaining to the screening and selection process ensure that the selection criteria are upheld. The third pillar of the EL criteria is transparency. The objective here is to ensure that investors interested in EL-certified funds clearly understand the fund’s investment strategy. Adherence to the EL guidelines is verified by independent experts.

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Bellevue Asset Management

Bellevue Asset Management and its sister company StarCapital based in Oberursel outside Frankfurt, Germany are part of Bellevue Group, an independent, Swiss financial group with a registered office in Zurich and a listing on the Swiss Exchange SIX. Bellevue was established in 1993 and has since become a leading investment boutique with a focus on healthcare, regional strategies, multi-asset solutions and global equity and bond funds. Assets under management amount to CHF 12.7 billion.

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