

# ebi and Amundi launch socially responsible investing (SRI) index-based MPS range

ebi Portfolios, the award-winning discretionary fund manager, and Europe's largest asset management firm, Amundi, today unveil a new socially responsible investment solution, the SRI portfolio range.

This suite of low-cost model portfolios are designed for investors seeking a globally diversified SRI solution, investing in passively managed funds providing exposure to best-in-class ESG-rated equities and ESG-screened bonds globally.

The SRI equity portfolio invests in a range of Amundi SRI PAB equity funds, which track MSCI SRI Filtered PAB regional indices. The indices' methodology focuses on the top 25% ESG-rated companies relative to their sector peers and adopts a wide range of systematic environmental- and social-based exclusions, also excluding companies generating revenue from thermal coal mining or oil and gas extraction. Additionally, they are aligned with the EU Paris-Aligned Benchmark (PAB) regulation minimum requirements, including:

- A reduction in carbon intensity by 50%, compared to the underlying investment universe;
- A reduction in carbon intensity by 7% on an annualised basis.

The SRI bond element invests in two bond funds managed by Northern Trust Asset Management, which track Solactive Global Bond ESG Climate indices. These are focused on a global investment grade bond universe that is screened for ESG scores and carbon emissions, including targeting a 50% reduction in corporate bond carbon intensity compared to the parent index.

The range includes five portfolios, ranging from 100% equity to 20% equity allocations, with each portfolio invested across a range of regional equity funds and/or two fixed income funds. Risk in SRI bond element is reduced by blending the two fixed income funds to target a shorter duration than the wider market.

ebi's Investment Product Manager, Jonathan Griffiths, CFA, commented: "We know that investors seek to invest in line with their values, while also seeking competitively priced investment solutions. With the launch of our SRI portfolios, we are in the sweet spot where these two elements align. Providing enhanced ESG screening, and market-leading equity exposure aligned with the EU Paris-Aligned Benchmark minimum requirements, these portfolios are an exciting addition to our product suite and the wider MPS space."

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Ashkan Daghestani, Head of ETF, Indexing, and Smart Beta Sales for UK & Ireland at Amundi, added: “We are pleased to be selected by ebi, which will enable more and more UK investors to have access to our low-cost SRI index-based solutions. This partnership demonstrates our commitment to meeting the needs of UK investors, in particular for ESG index solutions at competitive pricing.”

ebi celebrated hitting the milestone of £2bn in assets under management (AUM) in June 2023, with AUM recently surpassing £2.5bn. ebi became part of Bristol-based platform Parmenion last year.

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**Notes to Editors**

Founded in 2010, ebi’s sustained growth is driven by an innovative investment proposition in conjunction with an award winning technology suite.

Offering a range of passively managed investment products, ebi has particular expertise in sustainable and factor model portfolios.

ebi strives to be at the forefront of ESG investing. Observing a lack of low-cost, diversified, passive, systematic ESG investment solutions in the marketplace – rather than waiting for such products to become available, it collaborated with leading sustainable investment managers to introduce cutting-edge sustainable investment solutions that are fair, robust, and transparent for end-clients.

Launched by an IFA, ebi understands the requirements of advisers in supporting their clients. Its award winning technology helps facilitate client conversations, mitigate risk and supporting advisers and their business.

Acquired by Parmenion in 2022, ebi continues to operate independently, but with the support and resources to help it achieve its ambitious growth plans.

To learn more, [visit ebi.co.uk](https://www.ebi.co.uk).

## About Amundi

Amundi, the leading European asset manager, ranking among the top 10 global players, offers its 100 million clients – retail, institutional and corporate – a complete range of savings and investment solutions in active and passive management, in traditional or real assets. This offering is enhanced with IT tools and services to cover the entire savings value chain. A subsidiary of the Crédit Agricole group and listed on the stock exchange, Amundi currently manages more than €2 trillion of assets.

With its six international investment hubs, financial and extra-financial research capabilities and long-standing commitment to responsible investment, Amundi is a key player in the asset management landscape.

Amundi clients benefit from the expertise and advice of 5,500 employees in 35 countries.

**Amundi, a trusted partner, working every day in the interest of its clients and society**

[www.amundi.com](http://www.amundi.com)



<sup>1</sup> Source: IPE “Top 500 Asset Managers” published in June 2023, based on assets under management as at 31/12/2022

<sup>2</sup> Amundi data as at 31/12/2023

<sup>3</sup> Boston, Dublin, London, Milan, Paris and Tokyo