

News release

BlueOrchard launches UCITS Impact Bond Fund to address UN Sustainable Development Goals in emerging markets

Zurich, 10 December 2018 – Swiss-based impact investment manager BlueOrchard Finance Ltd (“BlueOrchard”) has launched a UCITS-compliant Emerging Markets SDG Impact Bond Fund to grant retail and institutional investors access to a “liquid impact fund”. The Fund is designed for investors that seek a scalable and liquid alternative to traditional microfinance funds.

The BlueOrchard UCITS-Emerging Markets SDG Impact Bond Fund invests in bond issuances from corporations and public/private financial institutions that finance or engage in impact activities which advance the UN Sustainable Development Goals (SDGs). The fund will invest in a diversified portfolio in emerging and frontier markets with the goal of providing retail and institutional investors with a scalable, impact oriented alternative to traditional fixed income products. The Fund, registered in Luxembourg and managed by BlueOrchard Asset Management (Luxembourg), SA is accessible to investors with a variety of share classes in different currencies to suit investor requirements.

“Our investors have expressed considerable interest of late in a vehicle that combines financial and social returns with liquidity. We have responded by creating this Fund and believe that it presents an excellent opportunity for both BlueOrchard and our investors to further engage in key emerging markets and expand our impact,” said Patrick Scheurle, CEO of BlueOrchard.

“As a company founded by initiative of the UN, we are extremely proud to launch an impact fund dedicated to helping advance the UN Sustainable Development Goals in emerging markets,” said Peter A. Fanconi, BlueOrchard’s Chairman of the Board.

The Fund is managed by an experienced team with a long track record of successful debt investments in emerging and frontier markets. They combine a unique field presence, proprietary rating methodologies and broad hedging capabilities to deliver innovative impact investment products. BlueOrchard applies a robust country selection process and rigorous bottom-up credit selection governed by a proven risk management framework. In addition to financial analysis, BlueOrchard conducts a social performance analysis on all investments based on “SPIRIT”, the firm’s proprietary social performance assessment tool.

Building a financial system that supports sustainable and climate-smart growth has taken the center stage of global efforts to advance and achieve the SDGs. To address the growing investment gap in emerging and frontier markets, urgent and concerted action is needed. For BlueOrchard, closing this gap has been our mission since day one. The company has focused its mission and its investment strategies on empowering people in the developing world since 2001 and has deployed more than USD 5bn in more than 80 markets.

About BlueOrchard Finance Ltd

BlueOrchard is a leading global impact investment manager. The firm is dedicated to fostering inclusive and climate-smart growth, while providing attractive returns for investors. BlueOrchard was founded in 2001, by initiative of the UN, as the world’s first commercial manager of microfinance debt investments. Today, BlueOrchard provides investors around the world with premium investment solutions, including credit, private equity, and sustainable infrastructure. Being an expert in innovative blended finance mandates, the firm is a trusted partner of leading global development finance institutions. With a major global presence and offices on four continents, BlueOrchard has invested to date more than USD 5bn across 80 emerging and frontier markets, enabling tangible social and environmental impact. BlueOrchard is a licensed Swiss asset manager of collective investment schemes authorized by FINMA. Its Luxembourg entity, BlueOrchard Asset Management S.A., is a licensed UCITS management company as well as a licensed alternative investment fund manager (AIFM) authorized by CSSF. For additional information, please visit: www.blueorchard.com.

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