

News release

BlueOrchard reports continued strong performance and social outreach in 2019

- Flagship BlueOrchard Microfinance Fund exceeds USD 2.4 billion and continues to deliver strong performance
- BlueOrchard SDG Impact Bond Fund exceeds the USD 350 million investment mark in its first year
- Expansion of prestigious Japan ASEAN Women Empowerment Fund to USD 241 million to address the significant financing gap of women in Asia
- More than 1bn USD disbursed in more than 100 institutions across over 40 countries in 2019
- Access to financial and related services provided to more than 38 million low-income individuals in emerging and frontier markets

Zurich, 23 January 2020 – Swiss-based impact investment manager BlueOrchard Finance Ltd (“BlueOrchard”) looks back on a landmark year in 2019, with strong performance and growth across its product range and more than 38 million individuals reached. Following the achievement of a number of significant milestones throughout the year, BlueOrchard’s position as the leading impact investment manager has been reinforced, placing it on a sustained growth path and paving the way for a promising and eventful year ahead.

Building on the positive results reported in the first half of the year, BlueOrchard has continued to strengthen its position as the leading impact investment manager, delivering strong social and financial performance across all of its funds in 2019.

The flagship fund, the BlueOrchard Microfinance Fund (BOMF), reached USD 2.4 billion in assets under management by the end of December. The fund delivered good financial returns to investors throughout the year, while also achieving a positive social impact across 11 of the UN Sustainable Development Goals (SDGs). With a 20 year track record, BOMF is the world’s first and largest commercial microfinance fund dedicated to emerging and frontier markets.

The BlueOrchard SDG Impact Bond Fund, launched in August 2018, also saw significant growth throughout the year, exceeding USD 350 million by the end of 2019. This demonstrates investors’ continued appetite for a product that combines financial returns and social impact, while providing increased liquidity.

Meanwhile, we announced the expansion of the Japanese ASEAN Women Empowerment Fund (JAWEF), reflecting the success of this initiative since its launch in 2016. In doubling the fund’s size to USD 241 million, it will be able to continue addressing the significant financing gap for women in Asia, increasing outreach to 700,000 women in need.

The second half of 2019 also saw the announcement of a new partnership between BlueOrchard and Schroders, a UK-listed investment manager with a strong global distribution network. Partnering with Schroders enables BlueOrchard to further drive innovation and growth, increasing its impact across emerging and frontier markets.

“2019 has been a very successful year for BlueOrchard, in which we again delivered strong performance and achieved a number of significant milestones which will position us well for the future. We are proud to see continued growth across our product range and believe that the new relationship



with Schroders will be key to continuing to deliver this in the future. We would like to thank our existing and new investors for the continued trust they have placed in us and look forward to providing our partners around the world with the best possible impact solutions in 2020”, said Patrick Scheurle, CEO of BlueOrchard.

“The desire to combine a positive social impact with achieving a financial return is becoming increasingly prominent in investors’ minds. As the appetite for impact investing continues to build, we are excited to be able to provide innovative solutions across a range of asset classes that allow investors to contribute to solving pressing global challenges such as poverty, inequality and the consequences of climate change,” said Peter A. Fanconi, BlueOrchard’s Chairman of the Board.



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 5.7bn 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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