

News release

BlueOrchard celebrates 20th anniversary

Zurich, 15 March 2021 – BlueOrchard Finance Ltd (BlueOrchard) has reached an exciting milestone. The impact investing pioneer celebrates 20 years of generating lasting positive impact for communities and the environment, while providing attractive returns to investors. Through BlueOrchard’s investments, millions of people with low income in emerging and frontier markets received access to financial and related services. Some of these are portrayed in BlueOrchard’s anniversary book “This Is My Story”.

BlueOrchard was founded in 2001, by initiative of the UN, as the first commercial manager of microfinance debt investments worldwide. The company has evolved into a leading global impact investment manager, offering impact investment solutions across asset classes. The BlueOrchard Microfinance Fund is the world’s first and largest commercial microfinance fund with USD 2.5bn AuM. BlueOrchard has also branched out into new asset classes such as Private Equity and Sustainable Infrastructure, leveraging its unique expertise in emerging markets and a long-standing core commitment to responsible development. As a professional investment manager and expert in innovative blended finance mandates, BlueOrchard has a sophisticated international investor base and is a trusted partner of leading global development finance institutions. Its multinational and diverse employee base is located mainly in emerging and frontier markets, with deep local expertise and maintaining extensive networks in the respective regions. Since 2019, BlueOrchard has been a member of the Schroders Group and is sharing and contributing to its objective to deliver positive outcomes for all.

Peter Fanconi, Chairman of the Board of BlueOrchard, said: *“Since inception, BlueOrchard has successfully balanced generating lasting impact alongside attractive financial returns, proving that these can go hand in hand. It has been an incredible journey and we look forward to the next 20 years. We thank our partners globally for their continued trust in BlueOrchard.”*

Philipp Mueller, CEO of BlueOrchard, said: *“For two decades it has been BlueOrchard’s mission and vision to make impact investment solutions accessible to all and to advance the conscious use of capital which benefits society and the environment. We will continue on this path and meet investors’ demand for innovative and truly impactful strategies.”*

Peter Harrison, Group Chief Executive Officer, Schroders, commented: *“BlueOrchard is a wholly purpose driven organisation, and its work in microfinance and with development agencies has provided investors with robust financial returns but, most importantly, BlueOrchard has also demonstrably benefitted millions of people in emerging markets over the past two decades.”*

“Impact investing is now a mega trend but BlueOrchard has been pioneer in this field for 20 years. Schroders, a similar purpose driven organisation, is proud to work so closely with BlueOrchard and we are looking forward to collaborating as specialist impact-focused investors for another 20 years and beyond.”

In celebration of its 20th anniversary, BlueOrchard, working together with National Geographic, has published the book [“This Is My Story – Giving a Face to 20 Years of Impact Investing”](#), sharing some of the entrepreneurial stories, personal dreams and insights into the lives of families around the globe who are struggling and fighting against adversity every single day.

- ends -

About BlueOrchard Finance Ltd

BlueOrchard is a leading global impact investment manager and member of the Schroders Group. As a pioneering impact investor, the firm is dedicated to generating lasting positive impact for communities and the environment, while providing attractive returns to investors. BlueOrchard was founded in 2001, by initiative of the UN, as the first commercial manager of microfinance debt investments worldwide. Today, the firm offers impact investment solutions across asset classes, connecting millions of entrepreneurs in emerging and frontier markets with investors with the aim to make impact investment solutions accessible to all and to advance the conscious use of capital. Being a professional investment manager and expert in innovative blended finance mandates, BlueOrchard has a sophisticated international investor base and is a trusted partner of leading global development finance institutions. To date, BlueOrchard has invested more than USD 8bn across more than 90 countries. Over 215mn poor and vulnerable people in emerging and frontier markets received access to financial and related services with the support of BlueOrchard as of December 2020. For additional information, please visit: www.blueorchard.com.

About Schroders

As a global active asset manager, the way we direct capital not only shapes the financial returns we achieve but also the type of impact we have on the world. The relationship between these two outcomes has rapidly evolved as we see a fundamental shift in how companies are viewed and valued. Understanding the impact that they have on society and the planet is crucial in determining their true costs and ultimately their impact adjusted profits.

Our ongoing success is built on a history of experience and expertise, whereby we partner with our clients to construct innovative products and solutions across our five business areas consisting of Private Assets & Alternatives, Solutions, Mutual Funds, Institutional and Wealth Management and invest in a wide range of assets and geographies. By combining our commitment to active management and focus on sustainability, our strategic capabilities are designed to deliver positive outcomes for our clients.

We are responsible for £574.4 billion (€641.7 billion/\$785.1 billion) assets of our clients, managed locally by 42 investment teams worldwide. As a global business with over 5,500 talented staff across 35 locations, we are able to stay close to our clients and understand their needs. We have over 200 years of experience in investment and innovation and remain committed to creating a better future by investing responsibly for our clients.*

Further information about Schroders can be found at www.schroders.com. Registration No 1893220 England. Authorised and regulated by the Financial Conduct Authority. For regular updates by e-mail please register online at www.schroders.com for our alerting service.

*as at 31 December 2020

For further information, please contact:

Tahmina Theis

+41 22 596 47 69

tahmina.theis@blueorchard.com

www.blueorchard.com

Follow us on



Disclaimer:

The information in this document was produced by BlueOrchard Finance Ltd ("BOF") to the best of its present knowledge and belief. However, all data and financial information provided is on an unaudited and "as is" basis. The opinions expressed in this document are those of BOF and its employees and are subject to change at any time without notice. BOF provides no guarantee with regard to the accuracy and completeness of the content in this document and BOF does not under any circumstance, accept liability for any losses or damages which may arise from making use of, or relying upon any information, content or opinion provided by BOF in this document. This document may contain references or links to other documents and websites and BOF has not reviewed such other documents and websites and is not responsible in any way in relation to the content of such documents and websites.

The information in this document is the sole property of BOF unless otherwise noted, and may not be reproduced in full or in part without the express prior written consent of BOF.

All investments involve risk. We note specifically that past performance is not an indication of future results. Emerging markets impact investments involve a unique and substantial level of risk that is critical to understand before engaging in any prospective relationship with BOF and its various managed funds. Investments in emerging markets, particularly those involving foreign currencies, may present significant additional risk and in all cases the risks implicated in this disclaimer include the risk of loss of invested capital.

The materials provided in this document are for informational purposes only and nothing in this document can be construed as constituting any offer to purchase any product, or a recommendation/solicitation or other inducement to buy or sell any financial instrument of any kind and shall not under any circumstances be construed as absolving any reader of this document of his/her responsibility for making an independent evaluation of the risks and potential rewards of any financial transaction. We note in particular that none of the investment products referred to in this document constitute securities registered under the Securities Act of 1933 (of the United States of America) and BOF and its managed/advised funds are materially limited in their capacity to sell any financial products of any kind in the United States. No investment product referenced in this document may be publicly offered for sale in the United States and nothing in this document shall be construed under any circumstances as a solicitation of a US Person (as defined in applicable law/regulation) to purchase any BOF investment product.

The information provided in this document is intended for review and receipt only by those persons who are qualified (in accordance with applicable legal/regulatory definitions) in their respective place of residence and/or business to view it, and the information is not intended under any circumstances to be provided to any person who is not legally eligible to receive it. Any recipient of information from this document who wishes to engage with BOF in furtherance of any transaction or any relationship whatsoever must consult his/her own tax, legal and investment professionals to determine whether such relationship and/or transaction is suitable.

By no means is the information provided in this document aimed at persons who are residents of any country where the product mentioned herein is not registered or approved for sale or marketing or in which dissemination of such information is not permitted.

BOF disclaims all liability for any direct or indirect damages and/or costs that may arise from the use of (whether such use is proper or improper), or access to, this document (or the inability to access this document).

The use of UN Sustainable Development Goals (SDG) icons is for purely informational purposes in providing context for the impact proposition of the investments contemplated by the Fund. The use of SDG icons and/or any reference to the SDGs is non-promotional and in no way is intended to reflect endorsement of the Fund by the United Nations nor affiliation with BlueOrchard Finance, the Schroders Group or any of its subsidiaries.

Copyright © 2021, BlueOrchard Finance Ltd. All rights reserved.