

## **Axiom Alternative Investments extends its equity fund range**

### ***Launch of the Axiom Long Short Equity Fund***

#### ***Exciting opportunity to leverage Axiom's expertise in European financial stocks***

**Axiom Alternative Investments, the independent asset manager specialising in European financial stocks, is pleased to announce the launch of its new Axiom Long Short Equity Fund, as it extends its equity range.**

**This launch complements its Axiom European Banks Equity, a long-only fund specialising in European banking equities, which was launched 10 years ago and has been a strong performer.**

**Indeed, the Axiom European Banks Equity has outperformed the European Banks Stocks index (SX7R) by 52.08% since inception (2014) and by 150.23% since 31 December 2018<sup>1</sup>. Axiom European Banks Equity has recently been named Best Equity Financials Sector Fund (over 3 and 5 years) by the 2024 LSEG Lipper Fund Awards for Europe and Switzerland.**

The new fund, Axiom Long Short Equity, is designed as an investment solution with an absolute return objective, aiming to replicate the outperformance of Axiom European Banks Equity above the Stoxx 600 Banks index (SX7R) with lower volatility and downside risk than long-only management. Axiom Long Short Equity will be managed by Antonio Roman, who is the successful lead portfolio manager of Axiom European Banks Equity.

**"The capitalisation of the European banking sector now exceeds €1,000 billion, with a wide variety of business models, as reflected in the sector's strong financial results for 2023. For us, this dispersion and market depth are key performance factors in fund management. It's an exceptional investment universe for a specialist like Axiom, providing an exciting opportunity for us to leverage our expertise in European financial stocks and extend our range of equity funds," says David Benamou, CIO at Axiom Alternative Investments.**

**"As the European Banks sector turns the page on its 14-year transformation chapter with a record year in 2023, we believe that its improving performance, and the prospects from falling interest rates and economic recovery, create a very good context for the launch of Axiom Long Short Equity", says Antonio Roman, Axiom's manager of the new fund.**

<sup>1</sup> Past performance do not predict future returns. The return may increase or decrease as a result of currency fluctuations, for the shares which are not currency-hedged.

## Axiom Alternative Investments Group

Founded in 2009, **Axiom Alternative Investments** is an independent asset management company based in Paris, Geneva and London via its subsidiary AXM Alternative Investments, specialising in European financial stocks. The company currently manages €2.2 billion (as of 27/03/2024) through a range of UCITS funds and dedicated mandates covering all instruments issued by European financial institutions (senior secured<sup>1</sup> and unsecured<sup>2</sup> debt, subordinated debt and equities). These investment vehicles are marketed in Europe to institutional clients, family offices, private banks and IFAs.

Learn more about **Axiom AI** on [www.axiom-ai.com](http://www.axiom-ai.com)

<sup>1</sup> Senior secured debt is debt secured by an asset belonging to the issuer which will be used to honor the commitments associated with this debt in the event of default.

<sup>2</sup> Senior unsecured debt is unsecured debt. Repayment depends solely on the issuer's ability to meet its financial commitments.

## The Lipper Fund Awards Methodology

The merit of the winners is based on objective, quantitative criteria. The influential and prestigious LSEG Lipper Fund Awards are based on our Lipper Leaders Rating for Consistent Return. Individual classifications of three, five, and 10-year periods, as well as fund families with high average scores for the three-year period, are also recognized. The awards are based on LSEG Lipper's proven proprietary methodology, which can be viewed [here](#).

## Main risks

Risk of loss of capital, discretionary management risk, equity risk, currency risk, portfolio concentration risk, counterparty risk, risk associated with commitments to financial derivative instruments, risk associated with subordinated debt securities, sustainability risk, legal risk.

SRI risk scale 3 out of 7 for the *early adopter* share class AC EUR (LU2706208332), which is open for subscription up to 30 million euros. Recommended investment period: 3 years. SRI risk scale from 1 to 7, from the lowest risk level (which does not mean risk-free) to the highest. The score indicated combines market and credit risk, and may change over time.

Risk of loss of capital, operational risk, currency risk, credit risk, counterparty risk, exchange rate, liquidity risk, use of derivatives and climate/ESG data risk.

SRI risk scale 6 out of 7 for the HC EUR(v) (LU1876459212) share class. Recommended investment period: 5 years. SRI risk scale from 1 to 7, from the lowest risk level (which does not mean risk-free) to the highest. The score indicated combines market and credit risk, and may change over time.

	Calendar performance									
	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
AEBE - HC EUR(v)	-10.10%	2.43%	-4.01%	12.71%	-37.89%	21.31%	6.84%	56.84%	2.03%	31.69%
SX7R	-1.67%	-0.40%	-2.83%	11.73%	-25.37%	13.52%	-24.42%	38.54%	1.06%	26.46%

Past performance do not predict future returns. The return may increase or decrease as a result of currency fluctuations, for the shares which are not currency-hedged.

### Disclaimer

Marketing communication. Please refer to the prospectus and the key information document (KID) before making any final investment decision. This document is published by Axiom Alternative Investments, a French asset management company registered with the AMF under no. GP-06000039. It does not constitute an offer to subscribe or investment advice.

The information contained herein may be incomplete and is subject to change without notice. The prospectuses, KID, net asset values and annual reports of the funds are available from Axiom Alternative Investments or on <http://www.axiom-ai.com>. The risks and charges relating to the funds are described in the KID/prospectus.

Axiom European Banks Equity and Axiom Long Short Equity are sub-fund of AXIOM LUX, an open-ended investment company with variable capital governed by Luxembourg law and complying with the UCITS Directive. The management company may decide at any time to cease marketing in your country. Investors can access a summary of their rights in English at the following link <https://axiom-ai.com/web/en/regulatory-information/>

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