

Press Release

Effectual wins high profile senior advisors

Thomas Kieselstein, Antonis Schwarz and Professor Dr. Marco Wilkens support Effectual's sustainable return as objective, verifiable and comprehensive framework for sustainable investing

(Munich, August 30, 2023) With the sustainable return metric, Effectual has developed an objective, verifiable and comprehensive framework for sustainable investing. Existing approaches are often highly subjective and opaque, not meeting the fiduciary standards of institutional investors.

For an effective contribution to the sustainable transformation of the economy, the Effectual principle applies the established economic theory of externalities to portfolio management. Essentially, it takes into account overall social costs and benefits at realistic valuations. The first application of this principle is the recently launched Effectual Capital Fund – Global Sustainable Equities, which uses sustainable return to construct a portfolio of global equities in developed markets.

Now, Effectual will be supported by high profile senior advisors, starting in the course of September. Dr. Andreas Gintschel, co-initiator and managing director at Effectual, says: "Our approach can make the difference for the universal acceptance of sustainable investing. We are very grateful and pleased that high profile senior advisors Thomas Kieselstein, Antonis Schwarz and Professor Dr. Marco Wilkens support our mission."

Effectual's senior advisors are:

Thomas Kieselstein Co-Founder and long-time Senior Partner at Quoniam Asset Management, where he most recently served as Chief Investment Officer. In addition to his extensive management experience, Thomas Kieselstein has excellent expertise in the fields of investment strategies & processes, empirical finance and sustainable investing. Thomas Kieselstein holds a degree in industrial engineering from the Karlsruhe Institute of Technology and is a Chartered Financial Analyst (CFA).

Antonis Schwarz, a private impact investor, philanthropist and impact investing consultant at PHINEO. Previously, he worked, i.a., for the BMW Foundation Herbert Quandt and has launched a number of initiatives. He founded the democracy and transparency platform for Greek politics Vouliwatch as well as the Guerrilla Foundation. He is also a co-founder of the Center for Sustainable Finance and Private Wealth (CSP) at the University of Zurich. Antonis Schwarz holds a Master of International Management from IE Business School and a Bachelor on European Studies from King's College, London.



Professor Dr. Marco Wilkens, Chair of Finance and Banking at the University of Augsburg, is a leading German academic in the field of investment funds and sustainable finance. He is also co-founder of the Sustainable Finance Research Platform and the Center for Climate Resilience at the University of Augsburg. For the Research Platform he is a permanent observer of the Sustainable Finance Advisory Committee of the German government. He holds a doctoral degree from the University of Hamburg and a habilitation from the University of Göttingen.

www.effctl.com

About Effectual

„Making capital effectual for the transition to the sustainable economy.“

Effectual stands for an economically effective approach to sustainable investing. Its foundation is the theory of externalities: When overall costs to society are quantified and internalized, a Pareto-optimal equilibrium can emerge. Effectual translates this principle into the "Effectual® Sustainable Return". For the first time, sustainable portfolios can be constructed along objective, verifiable and comprehensive criteria.

The Effectual principle was developed by Dr. Andreas Gintschel and Dr. Christian Wiehenkamp for Effctl Capital GmbH, which provides licenses of the approach for investment products. Effectual was initiated and founded by the investment office Perpetual Investors GmbH, which is also behind Effctl GmbH.

The Effectual Capital Fund – Global Sustainable Equities is the first investment product to apply the sustainable return framework. The implementation partner for this Luxembourg UCITS fund is Quoniam Asset Management GmbH, a quantitative asset manager based in Frankfurt and London that develops customized investment solutions for institutional investors.

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