



Press Release

## **Effectual joins Bundesinitiative Impact Investing**

*Joining forces to make capital effectual for the transition to the sustainable economy*

(Munich, September 21, 2023) The investment specialists at Effectual have joined Bundesinitiative Impact Investing (BIII). With the sustainable return, Effectual has developed an objective, verifiable, and comprehensive framework for sustainable investing. To advance the transformation to the sustainable 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.

The Bundesinitiative Impact Investing promotes a significant reallocation and mobilization of capital toward impact investing to realize the vision of regenerative investing and business.

"We are united in the conviction that the potential of global capital markets can and must be used much more consistently for the sustainable transformation of the economy. With its economic, scientific approach, Effectual can make a substantial difference for the universal acceptance of sustainable investing," comments Dr. Andreas Gintschel, co-initiator and managing director of Effectual, on the membership and cooperation.

The Managing Director of the Bundesinitiative Impact Investing (BIII, German National Initiative for Impact Investing) Johannes P. Weber underlines: "The willingness of investors to act sustainably and impact oriented is continuously increasing. However, in many cases there is a lack of clear and measurable criteria as well as of solutions for impact and sustainable investing that meet the demands of professional, impact-oriented investors in particular. Effectual's approach can make a valuable contribution here. We are pleased to welcome this young company with its experienced creators to our over 100 BIII members."

### **About Bundesinitiative Impact Investing**

The Bundesinitiative Impact Investing (BIII) is the central platform for impact investing in Germany. It pursues the vision of regenerative investing and business that both respects ecological limits and adheres to social standards. BIII sees impact investing as a crucial tool to achieve this and therefore promotes the significant reallocation and mobilization of capital towards impact investing. The non-profit association is based in Berlin and has more than 110 active members.

BIII disseminates the impact investing approach through targeted communication activities such as physical and virtual panels, workshops and networking events, and is present at key conferences. It regularly conducts studies and publishes papers as part of a broad-based market monitoring program. BIII creates target group-specific access to training and further education and bundles central information and knowledge on impact investing. It networks its members with each other and with German, European and global partners. In addition, BIII advocates for a supportive framework for impact investing through political work. Further information: <https://bundesinitiative-impact-investing.de/>.

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### **About the Effectual Principle**

*„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 Effct! 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 Effct! 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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