

## Press Release

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### **Scope: Lupus alpha named best specialist provider for the fourth time**

**Almost 70 percent of the Lupus alpha funds assessed by Scope achieved a top rating**

**Lupus alpha was named “Best Asset Manager / Specialist Provider” in Germany for the fourth time since 2018 at this year’s Scope Investment Awards. The Scope Awards combine quantitative and qualitative analysis and are among the most distinguished awards presented to asset managers in German-speaking countries.**

“We are delighted to win this award once again. It provides us with confirmation of our ability to consistently exploit information inefficiencies in niche markets and successfully open up sources for income for investors,” said **Ralf Lochmüller, CEO and Managing Partner at Lupus alpha**, adding: “Achieving good investment performance is a marathon, not a sprint, so this award motivates us to continue providing our clients with attractive risk-adjusted components for their portfolios.”

**The Scope jury’s verdict:** “Lupus alpha are the recipients of the Scope Award in the “Specialist Provider” category for their impressive performance, with almost 70 percent of their funds assessed by Scope receiving a top rating. Lupus alpha’s flagship fund, which now manages EUR 550 million of assets, has significantly outperformed its competitors over both the medium and long term.

The flagship fund mentioned by the jury, **Lupus alpha Smaller German Champions** (ISIN LU0129233507), has generated an average performance of more than 11% p.a. since its launch in January 2002. While the fund has not managed to escape the current challenging environment with a performance of -30.28% (as of 31 October), it still outperformed its benchmark. “Investors who invest in this fund benefit from the long-term quality of Germany’s best small and medium-sized businesses and their ability to emerge stronger from crises. With price-earnings ratios falling to between 10x and 12x, we are once again buying in some cases,” explained **Björn Glück, Partner and Fund Manager responsible for** Lupus alpha Smaller German Champions.

As well as offering fund solutions in the European small and mid-cap segment, Lupus alpha now provides a variety of additional strategies capable of delivering sustainable alpha or risk premiums, including liquid alternative strategies, CLOs and convertible bonds.

“We particularly focus on volatility strategies,” explained **Alexander Raviol, Partner and CIO Alternative Solutions**. “Volatility as an asset class offers additional diversification, especially in times of crisis.” Lupus alpha has been one of Germany’s leading providers of volatility strategies for many years now, with **Lupus alpha Volatility Risk Premium** (ISIN DE000A1J9DU7) effectively helping to stabilise investor portfolios in extremely volatile markets with a performance of -3.61% (as of 31 October) since the start of the year.

**The Scope jury added:** “Another of the company’s plus points is the stability provided by the fact that each of the five leading members of the Executive Committee has an average of 26 years of industry experience.”

**Ralf Lochmüller** also emphasised the importance of Lupus alpha’s ownership structure. “One of our key success factors is our independence, as well as a partner model that allows us to involve our top performers in the company’s strategic development. The personal motivation and long-term continuity this creates among our partners provides the foundation for our corporate culture geared towards alpha.”

THE SCOPE INVESTMENT AWARDS METHODOLOGY: As part of a two-stage process, asset managers first qualify for nomination based on quantitative criteria. The Scope fund ratings of all funds approved for distribution in Germany are included in this evaluation, as well as their performance over the past 12 months (up to 30 September). As a second step, the corporate and investment processes of the nominated asset managers are assessed to determine the award winners.

#### **About Lupus alpha**

As an independent, owner-operated asset management company, Lupus alpha has been synonymous with innovative, specialised investment solutions for over 20 years. As one of Germany’s European small and mid-cap pioneers, Lupus alpha is one of the leading providers of volatility strategies as well as collateralised loan obligations (CLOs). Global convertible bond strategies complete its specialised product range. The Company manages a volume of almost EUR 13.5 billion for institutional and wholesale investors. For further information, visit [www.lupusalpha.de](http://www.lupusalpha.de).

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