

Press Release

21 November 2023

Scope: Lupus alpha named best specialist provider for the fifth time

Almost two-thirds of the Lupus alpha funds assessed by Scope achieved a top rating

Lupus alpha was named “Best Asset Manager / Specialist Provider” in Germany at this year’s Scope Investment Awards for the fifth time since 2018. 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 have been recognised once again for our performance as a manager of specialised asset classes,” said **Ralf Lochmüller, CEO and Managing Partner of Lupus alpha**, adding: “This is a fantastic achievement for the entire Lupus alpha team, and also motivates us to keep pushing forward. After all, past successes are no guarantee of future results.”

The Scope jury’s verdict: “This is already the fifth time that Lupus alpha has emerged victorious in the “Specialist Provider” category. This impressive record of success shows that the company is clearly still on the right track with its range of specialised products. The largest of the company’s funds assessed by Scope, Lupus alpha Smaller German Champions, generated the highest returns in its group across all of the periods considered (one, three, five and ten years). More than two-thirds of Lupus alpha’s funds received a top rating from Scope.”

With its actively managed, specialised investment concepts that operate off the beaten track, Lupus alpha aims to provide investors with added value in the form of alpha, sustainable risk premiums and intelligent risk management. **Lochmüller concluded:** “While every investor aims to build a well-diversified portfolio, a traditional 60/40 portfolio reaches its limits when both equities and bonds plummet simultaneously as they did in 2022.” As a result, Lochmüller continued, **“specialised strategies and alternative sources of return are essential components for long-term success in asset building**, helping to make portfolios more robust and enabling them to generate higher returns.”

Lupus alpha is a specialist provider in six investment segments: One of Europe's largest and most experienced teams manages around EUR 6 billion in **European small and mid-cap investments**. The Frankfurt-based asset manager is also one of Germany's leading providers of **CLO strategies** for senior secured corporate loans with EUR 4 billion in assets under management and, in the case of **convertible bonds**, one of the first providers of a sustainable strategy awarded the FNG Label with two out of three stars. Lupus alpha is also a pioneer of derivatives-based investment concepts – with **volatility, capital protection and risk overlay strategies** that benefit from more than 20 years of portfolio management experience.

Ralf Lochmüller is confident that Lupus alpha will be able to continue offering added value to investors with specialised strategies in the future, saying: "We have created a corporate culture that allows our highly-specialised portfolio management teams to focus on performance independently of any benchmark. Our partnership-based structure also enables us to keep top performers at the Company for the long term, thus creating a foundation for further growth as an independent asset manager."

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 and capital protection strategies as well as collateralised loan obligations (CLOs). Global convertible bond strategies and risk overlay solutions for institutional portfolios complete its specialised product range. The Company manages a volume of approximately EUR 14.0 billion for institutional and wholesale investors. For further information, visit www.lupusalpha.de.