



Media release

25 February 2022

Local commitment thanks to social return

Wealth manager Colin&Cie and its clients invest around CHF 200,000 in Red Cross projects. The Social Responsibility Fund was created in 2019 in close cooperation with the Red Cross, with the aim of generating a social return on investment (SROI) in addition to a financial return. The proceeds from the sustainable investment fund are used to support local Red Cross projects. This year, support is being given to family caregivers, chronically ill people and underage asylum seekers, within the scope of the education, poverty and healthcare goals of the UN Agenda for Sustainable Development.

Fund investors choose each year which projects should receive support. “A fund with which investors can invest sustainably, achieve an attractive financial and social return and play an active role themselves is in this way unique,” says Thomas Warnecke, the CEO of Colin&Cie.

SROI of CHF 200,000

In addition to a successful financial return of 20.8% in 2021, the fund also generated a social return of around CHF 200,000 that will be invested in selected Red Cross projects. This is double last year’s achievement. The Colin&Cie Social Responsibility Fund was developed in close cooperation with the Red Cross and is subject to the strictest sustainability criteria, according to ESG (environmental, social, and governance) standards, as well as Red Cross investment guidelines. Colin&Cie manages the fund, ensures ongoing monitoring, reporting and maximum cost efficiency.

Helping people in need

The Red Cross cantonal associations are grateful for the support. “The contribution helps us to support people living in poverty. We can stop them from getting into debt or having to claim social benefits,” says Stefan Bellwald, the managing director of the Zug cantonal association. In Ticino, the funds have made it possible for disadvantaged children to enjoy summer activities. As part of a mentoring programme in Zurich, young Red Cross volunteers help underage asylum-seekers with their job applications or finding accommodation. And in Schaffhausen, volunteers provide family caregivers with some precious respite time. The German Red Cross in the German state of Saarland will also receive a grant. The money will be used to finance projects that provide respite for family caregivers of dementia patients and facilitate the professional integration of refugees.



About the Swiss Red Cross (SRC)

No other relief organization combines such a wide variety of strengths in the health, integration and rescue sectors as the Swiss Red Cross. The SRC Group comprises 24 cantonal associations along with four rescue organizations, two institutions, and SRC Headquarters. www.redcross.ch

About Colin&Cie

Founded in 2009 in the wake of the financial crisis, Colin&Cie's mission is to strengthen client trust and put personal values at the centre. This in combination with the comprehensive expertise of the global financial industry. With more than CHF 2 billion in assets under management and a growth of CHF 600 million in 2021, Colin&Cie is one of the leading bank-independent wealth managers in Switzerland and Luxembourg. The Colin&Cie group has over 40 employees in its five offices in Zurich, Zug, Lugano, Schaffhausen and Luxembourg. www.colin-cie.com

Contacts

Swiss Red Cross:

Sabrina Hinder, Head of General Communication and History,
sabrina.hinder@redcross.ch, +41 58 400 42 05

Colin&Cie:

Andrea Kurz, Head of Marketing & Communication, andrea.kurz@colin-cie.com,
+41 58 218 85 83

This publication is for information purposes only. The information provided here does not constitute a recommendation or advice. The fund is based in Luxembourg. It is represented in Switzerland by UBS Fund Management (Switzerland) AG, Aeschenplatz 6, 4052 Basel. The paying agent in Switzerland is UBS (Switzerland) AG, Bahnhofstrasse 45, 8001 Zurich. The articles of association, the prospectus, the key investor information documents and the annual and semi-annual reports may be obtained free of charge from the representative in Switzerland.