

BetaPlus

The active answer to passive



Active solutions that **target excess returns** (0.5% p.a. gross) and **limited active risk** (1-2% ex-ante tracking error)¹



Over **15 years of experience**, managing **EUR 60+ billion** across a complete offering of building block equity solutions²



Aim to offer **consistent and positively skewed excess returns**, mostly driven by stock selection, over a full investment cycle¹



Also available as **Sustainable portfolios**, leveraging NAM's established leadership and expertise in Responsible Investments & Multi-factor solutions

Offering & Track Record³ (gross of fees, as of 31.07.2025)

BetaPlus Enhanced Equity Strategies ³	YTD			1y			3y (p.a.)			5y (p.a.)			Since Launch (p.a.)			AuM (m EUR)	Launch Date
	Perf.	Ex. Rtn.	TE	Perf.	Ex. Rtn.	TE	Perf.	Ex. Rtn.	TE	Perf.	Ex. Rtn.	TE	Perf.	Ex. Rtn.	TE		
Global Developed MSCI World Index	10.87% 10.88%	-0.01%		15.10% 15.72%	-0.62%	0.93%	16.98% 15.83%	1.15%	1.15%	15.12% 13.78%	1.34%	1.07%	11.03% 10.19%	0.83%	1.09%	9,017	Nov-14
North American MSCI North America Index	7.95% 8.81%	-0.87%		14.79% 16.70%	-1.91%	0.99%	16.86% 16.59%	0.27%	0.90%	15.51% 15.09%	0.42%	1.05%	14.19% 13.35%	0.83%	1.09%	2,456	Jul-09
Global Small Cap MSCI World Small Cap Index	9.35% 8.71%	0.64%		10.55% 8.42%	2.13%	1.13%	11.98% 9.38%	2.60%	1.56%	12.18% 10.39%	1.78%	2.04%	8.47% 7.59%	0.88%	2.04%	1,626	Mar-15
Emerging Markets MSCI EM 10/40 Index	19.28% 17.51%	1.77%		19.02% 17.18%	1.84%	1.36%	12.51% 10.50%	2.01%	1.69%	6.38% 5.40%	0.98%	1.79%	5.02% 4.00%	1.02%	1.48%	1,194	Jan-12
European MSCI Europe Index	10.21% 9.34%	0.87%		8.10% 7.62%	0.48%	0.79%	11.02% 10.32%	0.70%	0.81%	12.49% 11.86%	0.63%	1.09%	7.92% 7.49%	0.43%	1.09%	929	Dec-10
Technology Nasdaq 100 Index	8.99% 10.82%	-1.83%											10.21% 10.91%	-0.69%		385	Nov-24
Equal Weight MSCI World Equal Weighted																187	Jun-25
Japanese MSCI Japan Index	6.70% 5.50%	1.21%		7.40% 6.16%	1.25%	1.45%	18.13% 16.93%	1.19%	1.15%	17.86% 16.76%	1.10%	1.16%	10.14% 9.75%	0.39%	1.25%	35	Dec-09
US MSCI USA Index													4.63% 5.35%	-0.72%		29	Jan-25

BetaPlus Sustainable Enhanced Equity Strategies ³	YTD			1y			3y (p.a.)			5y (p.a.)			Since Launch (p.a.)			AuM (m EUR)	Launch Date
	Perf.	Ex. Rtn.	TE	Perf.	Ex. Rtn.	TE	Perf.	Ex. Rtn.	TE	Perf.	Ex. Rtn.	TE	Perf.	Ex. Rtn.	TE		
Global MSCI All Country World Index	13.37% 11.54%	1.83%		17.40% 15.87%	1.52%	1.63%	16.79% 15.25%	1.54%	1.57%	13.55% 12.79%	0.76%	1.64%	11.33% 10.64%	0.69%	1.54%	20,928	May-18
Global Developed MSCI World Index	12.52% 10.88%	1.64%		16.43% 15.72%	0.72%	1.56%	17.25% 15.83%	1.42%	1.68%	14.39% 13.78%	0.61%	1.63%	13.55% 12.71%	0.84%	1.63%	11,040	Nov-18
North American MSCI North America Index	9.81% 8.81%	1.00%		16.65% 16.70%	-0.06%	1.81%	17.09% 16.59%	0.50%	1.68%				14.79% 14.88%	-0.10%	1.64%	3,987	Sep-20
Emerging Markets MSCI EM 10/40 Index	19.39% 17.51%	1.88%		20.29% 17.18%	3.10%	1.61%	13.05% 10.50%	2.55%	2.30%	6.92% 5.40%	1.52%	2.52%	7.63% 5.99%	1.64%	2.62%	3,087	Nov-18
European MSCI Europe Index	9.47% 9.34%	0.13%		6.77% 7.62%	-0.85%	1.55%	10.33% 10.32%	0.01%	1.95%				11.32% 11.95%	-0.63%	2.25%	942	Feb-21
Global Small Cap MSCI World Small Cap Index	7.82% 8.71%	-0.89%		7.85% 8.42%	-0.57%	1.79%	9.81% 9.38%	0.42%	2.09%				4.83% 4.10%	0.73%	2.19%	901	Sep-20
Japan MSCI Japan Index	7.14% 5.50%	1.64%		8.41% 6.16%	2.26%	1.94%							17.00% 15.30%	1.71%	1.63%	373	Nov-23

BetaPlus Edge Equity Strategies ³	YTD			1y			3y (p.a.)			5y (p.a.)			Since Launch (p.a.)			AuM (m EUR)	Launch Date
	Perf.	Ex. Rtn.	TE	Perf.	Ex. Rtn.	TE	Perf.	Ex. Rtn.	TE	Perf.	Ex. Rtn.	TE	Perf.	Ex. Rtn.	TE		
Global Developed Sustainable MSCI World Index													9.40% 7.88%	1.52%		1,018	Feb-25

1) There can be no warranty that an investment objective, targeted returns and results of an investment structure is achieved. 2)Source: Nordea Investment Management as of 30.04.2025. 3)Source: Nordea Investment Management AB. Data as of 31.07.2025. The performance represented is gross of fees, composite and historical; past performance is not a reliable indicator of future results and investors may not recover the full amount invested. The value of your investment can go up and down, and you could lose some or all of your invested money. For illustrative purposes only.

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