FINANZ und WIRTSCHAFT FORUM
INSEL DER AUFMERKSAMKEIT

Active ETFs powered by Research

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Last year felt like a seminal one for active ETFs, marking a point where many European investors started to become more comfortable with the structure that is booming in the US.

Many anticipate the trend to catch fire over the coming months and become a key driver of flows into ETFs in Europe for years to come. Active management is part of Fidelity's DNA and in this workshop investors will learn how we access Fidelity's proven active investment and sustainable research expertise, while also enjoying the cost and transparency advantages of the ETF vehicle. We will address the following questions:

- What are active ETFs?
- How is the active ETF market evolving?
- How does Fidelity incorporate fundamental research within the ETFs?
- How is sustainability addressed within Fidelity active ETFs?
- What can clients expect from our active ETFs?

Our Fidelity Sustainable Research Enhanced Equity strategies are actively managed using a repeatable investment process, within a robust and disciplined risk management framework that allows a focus on stock-specific risk. They are alpha targeting above their benchmark indices over the long term, while reducing relative carbon footprint by 50% between 2020-2030 and aiming for net zero by 2050. They use Fidelity's proprietary fundamental and sustainable research to tilt exposure towards companies deemed fundamentally attractive, with positive sustainable characteristics and trajectories.

With around 170 equity analysts and 40 sustainable investing professionals, Fidelity's global research platform provides extensive coverage, access to senior management, and in-depth corporate knowledge. This provides the unique insights necessary for determining ESG factors' relevance to company operations, financials, and prospects, and the foundation for engaging directly with key decision-makers.(Data as at 25.01.2024)

Fidelity active ETFs can be used as replacements for core equity index funds and as building blocks within ESG solutions aiming to achieve alpha at a competitive price point.

Daniel is a portfolio manager at Fidelity International, specializing in research-based equity strategies. These strategies leverage Fidelity's proprietary fundamental and sustainable research and are built using quantitative portfolio construction techniques. Specifically, he co-manages the Fidelity Sustainable Research Enhanced Index strategy, which includes 6 regional variations with a combined strategy AuM in excess of c.4bn. He has also been involved in research strategies since joining Fidelity in 2015 and works extensively on ongoing development and assessing climate risks. Prior to Fidelity, Daniel was a graduate analyst on the QEP (Quantitative Equity Products) investment team at Schroders, assisting in the management of +$40B in pure quantitative equity funds. Daniel has a Masters degree in Aeronautical Engineering from the University of Bristol and is a CFA Charter holder.