

Company profile

Ready, set, future!

Our group of companies

Union Investment has forged a unique path for over 65 years. We are the asset management experts in the Genossenschaftliche FinanzGruppe. Overall, around 5.7 million clients* entrust their money to Union Investment. We develop investment solutions with substance and added value for private and institutional investors.

Our more than 4,000 employees* achieve these goals using careful consideration, precise analyses and their many years of experience. We currently manage assets worth 454.1 billion euros.* With our broad range of products, we will successfully conquer the next generation of our industry.

Strategic management

Union Asset Management Holding AG

Market development



Private Clients



Institutional Clients

Areas of expertise



Portfolio Management



Real Estate

Services



Fund Services



Infrastructure

Our mission

We increase our investors' assets and earn their trust in doing so.

In fulfilling this mission, we are guided by our values. After all, we know that entrepreneurial decisions require a reliable framework.

What does it take for us to believe in a new idea, and where do new developments take us? We have to act responsibly at all times and live up to the standards we impose on ourselves. We achieve this by reflecting on our values – cooperative identity, partnership, professionalism, transparency and sustainability. These are the values which guide us.

Sustainability is a value which implies taking responsibility for our actions.

As a custodian ...



- ... who represents the interests of investors in dealings with companies.
- ... who invests the assets of its investors in capital markets based on clearly defined social, ecological and ethical criteria.
- ... who acts responsibly in investment strategies, for example with sustainable real estate as part of our portfolio.

As a company ...



- ... that creates good working conditions for our employees.
- ... that helps shape the social environment.
- ... that puts sustainable management into practice.

Society



- "mitMenschen" initiative (employees volunteering and giving back to society)
- Promoting financial education

Employees



- Employee development
- Talent development
- Reconciling career and family life
- Work-Life-Balance

Environment



- "2° are achievable" climate strategy
- ISO 14001 certified management system
- Climate-neutral business travel by rail

We live our responsibility as part of society.

Hans Joachim Reinke

Combining sustainability and growth

We have seen savings habits gain significant momentum. We and our cooperative partners have worked tirelessly towards an important goal: Investors are rethinking their money and acting accordingly. In addition to good performance, they also attach growing importance to the sustainability of their investments. As an active asset manager, we meet both these client needs with the help of our cooperative partners. That is impressively demonstrated by the 584,000 net new savings plans opened in 2021.

 [ready-set-future.eu/reinke](https://www.ready-set-future.eu/reinke)

“Investors are rethinking their money. In addition to good performance, they also attach growing importance to sustainability. As an active asset manager, we and our cooperative partners can meet both needs in equal measure.”

Hans Joachim Reinke
Chairman of the Executive Board
at Union Investment





Sonja Albers

Shaping the future together

The world is in a state of constant flux. Client needs are changing, the complexity of regulatory requirements is growing and the world of work is also more dynamic. Anticipating and keeping pace with these trends is a feat of strength. But the effort is well worthwhile because change also holds many opportunities.

ready-set-future.eu/albers

“We want to shape change actively, not close our minds to it. Our employees’ willingness to perform and learn provides the basis for creating a future-proof working environment and, with it, the prerequisite for outstanding service.”

Sonja Albers

Member of the Executive Board

Alexander Lichtenberg

Putting a face to digitalisation

We shape digital transformation and develop innovative, differentiating business models. In doing so, we make increasing use of cloud technology to enable demand-driven development and ensure we are quick to market. In close consultation between specialist departments and IT, we develop scalable solutions, working together with our cooperative partners to create the digital interface to the client.

 [ready-set-future.eu/lichtenberg](https://www.ready-set-future.eu/lichtenberg)

“We develop scalable, demand-driven IT solutions which ensure we are quick to market. Working in close consultation with our cooperative partners, we are the digital interface to the client.”

Alexander Lichtenberg
Member of the Executive Board





André Haagmann

Client needs are a driving force

Recent years have seen Union Investment become the quality leader in the German market for institutional asset management. That is the result of our consistent focus on client needs along the entire value chain – from end-to-end client care, targeted portfolio and real estate management to individual sustainability and risk management.

ready-set-future.eu/haagmann

“The classic triangle of capital investment consisting of return, risk and liquidity, has expanded in recent years to include the two additional factors, sustainability and regulation. The resultant pentagon presents investors with challenges, but also opportunities, in their investments. We develop custom solutions for this.”

André Haagmann
Member of the Executive Board

2021 at a glance

Facts and figures

Milestones give direction and deliver answers. We faced many challenges in 2021. We look back with pride on the milestones we have achieved together – at the same time, they give us confidence in our ability to shape change actively from a position of strength.



48 different nationalities are represented amongst the Union Investment workforce. (as of 31 December 2021)



EUR 454.1 billion funds managed by Union Investment as at end of 2021.



For the 19th time running

Union Investment was awarded the top score of five stars in the Capital magazine's "Fonds-Kompass" in February.

EUR 19.7 billion

is the net sales generated with private investors in 2021 – twice as high as in the previous year.

584,000 new savings plans opened at Union Investment in 2021. Around two-thirds of these are equity fund savings plans.



27 years old or younger

That's the age of one third of new savings plan clients.

60 % is the share of sustainable fund solutions in new business with private clients.



Publishing details

Published by

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Concept and design

Format Communications, Hamburg

Images

Cover Page: Erik Isakson/Tetra Images (Getty Images); p. 2-3:
Vitolda Klein (unsplash); p. 4-5: Geber86 (Getty Images);
p. 7,11,12: Florian Büttner; p. 8: Fritz Philipp

Printed by

Görres-Druckerei und Verlag GmbH, Neuwied

Paper

This brochure was produced on Inapa Oxygen silk paper and is
made from 100 % recycled paper.

This brochure was made using a climate-neutral production
process. Details are available at www.natureOffice.com under
registration number DE-UI-534077.

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