



EDMOND DE ROTHSCHILD CORPORATE FINANCE ADVISES THE SHAREHOLDERS OF LORÉ ON THE ACQUISITION OF A STAKE BY IDICO

Edmond de Rothschild Corporate Finance is advising the shareholders of Loré on the acquisition of a stake by idiCo.

Loré, founded in 2009 by Charlotte Valette, develops SaaS solutions for players in real estate, and social real estate in particular. Loré has grown its business activities substantially in the last four years by marketing its property tax digitalisation and optimisation platform, WIM.

At the start of the year, the company launched Alfons, a digital platform for simulating, managing and optimising all types of local taxes for owners of professional and industrial real estate assets. Currently supplying over 250 companies, Loré's long-term goal is to address real estate players across the board through next-generation IT solutions combining professional expertise and the user experience.

With the support of idiCo, the management of Loré aims to pursue organic business growth, particularly in social real estate, by gaining new market share and developing fresh solutions, such as that arising from the acquisition of Apoca in March.

"We met with a management team that is both experienced and visionary, and with crystal-clear development priorities. Charlotte and Antoine Valette have totally mastery over their market and know how to respond to its expectations with exactly the right products. With its robust technological and human-centric foundations, Loré is ideally positioned to step up its development both through organic growth and acquisitions," **said Frédéric Mimoun, Managing Partner of idiCo, and Jean-Marie Giannettini, Chief Investment Officer at idiCo.**

"We are proud to announce that our investment in Loré stands as the first engagement of the idiCo Expansion 4 fund, the fourth generation of idiCo's small-cap funds. We are eager to move ahead with our investments, given the highly promising pipeline currently under formation," **said Benjamin Arm, Chief Executive Officer of idiCo.**

"We are delighted by the new partnership with idiCo and their trust in us. We met with a committed team and a partner that will know how to support us in our ambitious growth strategy. For over ten years now, we have worked to respond to the needs of our market with innovative solutions. Today, we can harness our solid foundations to accelerate our growth and become an essential player in real estate," **said Charlotte Valette, Director and Co-Founder of Loré.**

By supporting the shareholders of Loré, Edmond de Rothschild Corporate Finance is confirming its expertise in the Tech and Digital sectors, and particularly in the Software segment, having

recently advised the transactions of Amelkis, Neoledge, Payxpert (Societe Generale), Hoppen, Cleyrop, YesWeHack, ACA (Cegid), WiiSmile, and Idnomic (Atos).

PARTIES TO THE TRANSACTION :

INVESTORS

LORÉ: Charlotte Valette, Antoine Valette, Paul de Caunes, Benjamin Deloison

IDICO: Frédéric Mimoun, Jean-Marie Giannettini, Eléna Ermolenko, Clément Prevost

SHAREHOLDER ADVISORY

EDMOND DE ROTHSCHILD CF (M&A): Alexandre Aron-Brunetière, Guillaume Jaureguiberry, Clément Decante, Mariah Atchekzaï

ADVANCE (Financial VDD): Olivier Poncin, David Morel, Sébastien Ribeiro

ARNAUD PARTURIER (Corporate Lawyer): Arnaud Parturier

CMS FRANCIS LEFEBVRE (Tax Lawyer): Philippe Gosset

ABOUT THE EDMOND DE ROTHSCHILD GROUP

A conviction-driven investment firm founded on the conviction that wealth should be used to build a better world for the future, Edmond de Rothschild specialises in private banking and asset management. Serving an international clientele of families, entrepreneurs and institutional investors, Edmond de Rothschild is also active in corporate finance, infrastructure finance, private equity, real estate and fund services.

Thanks to its resolutely family-based structure, Edmond de Rothschild has the independence it needs to be able to offer bold strategies and long-term investments rooted in the real economy.

At 31 December 2023, the Group, founded in 1953, had over CHF 163 billion in assets under management, 2,600 employees and 28 locations worldwide.

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