



Edmond de Rothschild Asset Management raises nearly €5.5 billion in 2025, marking its fifth consecutive year of positive inflows

- **Net inflows of €5.4 billion in 2025 and €17.5 billion cumulatively over five years, bringing assets under management to €107 billion.**
- **Strong commercial momentum across all geographies, with diversified inflows across different asset classes.**
- **Major strategic developments to come in 2026**

In 2025, Edmond de Rothschild Asset Management enjoyed excellent commercial momentum, with nearly €5.5 billion raised globally. This marked the fifth consecutive year of positive net inflows, with a cumulative total of €17.5 billion over five years. This sustained growth trajectory is based on multi-asset class conviction-driven management, the identification of selective, value-creating investment themes, and the expertise of recognised management teams in both listed and unlisted markets. All geographical regions contributed to this growth, particularly France, Italy and Spain.

A focused, differentiated and innovative conviction-based management offering

Edmond de Rothschild Asset Management has made the strategic choice to focus its offering on differentiated and innovative strategies. The uniqueness of this positioning contributes to the solidity of the results recorded, with two-thirds of flows directed towards listed assets (equities, bonds, diversified management) and one-third towards unlisted strategies.

Flagship strategies in listed management: The international Big Data equity strategy now has more than €3.2 billion in assets under management, while the Hybrid Corporate Debt strategy launched three years ago has reached more than €1 billion in assets under management, becoming the second largest strategy in this asset class in Europe. The Millesima 2030 maturity bond fund strategy raised more than €660 million last year, bringing the cumulative inflows for the Millésima range to €5 billion since its launch in 2008. The new Millesima 2032 fund, positioned on high-yield bonds, has just been launched.

Edmond de Rothschild's unlisted franchise attracted one-third of inflows in 2025. The investment platform includes a comprehensive range of investment solutions in private equity, real estate and infrastructure debt. The BRIDGE infrastructure debt platform, launched 10 years ago, attracted significant inflows in 2025, reaching €6.5 billion in assets under management. With more than €13 billion in assets under management and net inflows of nearly €1 billion in 2025, Edmond de Rothschild REIM confirmed the growth momentum of its business and its position as a leading player in the real estate market.

High ambitions for 2026 in terms of inflows and innovation

Ambitions for 2026 are strong, driven by the arrival of new experienced sales profiles (particularly in Germany, Belgium, Italy and the Nordic countries). **Development**

with IFA clients in France remains a major focus, thanks to the existing team of four people and upcoming recruitment. Edmond de Rothschild AM currently manages around €2 billion for CGP clients, in equity strategies (Big Data, Global Resilience) and bond strategies (Millesima, Bond Allocation), as well as in unlisted assets with the EdR Europa SCPI and the EdR Private Equity Opportunities FCPR.

2026 will also see the launch of **new quantitative management strategies**. This new type of management strategy, based on mathematical models, complements the firm's traditional range of active funds. The three-person team led by Bruno Taillardat and recruited at the end of 2025 will be joined by three new recruits this year.

Christophe Caspar, Global CEO of Edmond de Rothschild Asset Management, said: *"We are delighted with the renewed confidence of our clients, as demonstrated by sustained inflows over the past five years and a promising start to 2026. Edmond de Rothschild AM is thus confirming its position as a major player in independent asset management in Europe. With 250 years of family entrepreneurial history behind us, we are convinced that Europe currently offers some of the best investment opportunities in the world. This conviction is reflected in particular in our Smaller Companies strategy, which is highly appreciated by investors, the launch of Mission Europa, dedicated to strengthening the European Union, and the development of BRIDGE, our infrastructure debt platform serving the energy transition in Europe."*

About Edmond de Rothschild

Edmond de Rothschild is an investment house founded on the conviction that, when harnessed for the good of the real economy, wealth can have a meaningful impact and help to rejuvenate the concept of progress.

Driven by a culture of financial foresight for nearly three centuries, Edmond de Rothschild specialises in private banking and asset management, boasting recognised expertise in its main business lines of: wealth management, wealth engineering, life insurance, services for independent wealth managers, corporate finance, private equity, real estate, infrastructure, liquid strategies, and fund administration. The 100% family ownership structure gives the investment house real independence, serving to align with the interests of its clients and fostering the emergence of financial solutions adapted to the specific needs of a client base of families, entrepreneurs and institutional investors. At 31 December 2024, the Edmond de Rothschild Group had over CHF 184 billion in assets under management and a robust balance sheet with a CET1 of 19.7%. With more than 2,700 employees in 29 global locations, it ranks as a key player in the main markets where it operates, including Geneva, Luxembourg, Paris and Monaco.

Edmond de Rothschild is at the heart of a unique ecosystem of businesses ranging from farming, wine-making and hospitality to family philanthropic activities, the Gitana offshore racing team and the perfume house Caron.

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