



## Press Release

27 January 2022

### **TABULA REPORTS STRONG AUM GROWTH IN 2021, OUTPERFORMING OVERALL EUROPEAN FIXED INCOME MARKET GROWTH**

European ETF provider Tabula Investment Management Limited (“Tabula”) has reported that its assets under management (AUM) grew by 144% in 2021, from US\$275 million to US\$672 million, while the European fixed income ETF market as a whole grew significantly slower. New analysis from Tabula reveals the European fixed income ETP market saw assets under management grow by just 8% last year, with inflows of US\$43 billion.

Tabula’s analysis reveals that last year net new assets (NNA) for Article 8 European ETPs were US\$87 billion, compared to US\$42 billion in 2020. For Article 9 European ETPs, the 2021 figure was US\$17 billion compared to US\$10 billion for 2020. This near doubling of net new assets further highlights the systemic shift in investment guidelines occurring across the European investment landscape.

Article 8 funds promote, among other characteristics, environmental or social characteristics, or a combination of these, and Article 9 funds target bespoke sustainable investments.

Almost half of Tabula’s AUM is now in Article 8 or 9 ETFs, and US\$245 million of its roughly US\$400 million inflows last year went into its ESG strategies.

Tabula’s fixed income ETFs which saw the biggest growth in assets last year included the Tabula Haitong Asia ex-Japan High Yield Corp USD Bond ESG UCITS ETF (TAHY) which had US\$206 million in AUM by the end of 2021, despite only launching in September. The SFDR Article 9 Tabula EUR IG Bond Paris-aligned Climate UCITS ETF (TABC) saw its assets grow from launch in January 2021 to US\$123 million by



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December. The Tabula US Enhanced Inflation UCITS ETF (TINF) grew from US\$17 million to US\$100 million last year.

Commenting on the growth, Michael John Lytle, CEO of Tabula, said, “2021 was a transformative year for Tabula. Our focus on innovation, and meeting the needs of professional investors, resulted in a number of our fund’s seeing strong growth. Our emphasis on Article 8 and Article 9 sustainable solutions, together with the development of tools that enhance exposures such as hedging inflation exposure helped take an outsized share of client investments. We are excited about our next launch which will bring another Article 9 fund to the Tabula toolkit.”

Chief Commercial Officer Stefan Garcia added, “Last year we saw sustainable investing move mainstream, with new asset flows into European-listed ESG funds double that of 2020. Our discussions with investors show clear demand for funds that have sustainable investment targets and at Tabula we are passionate about providing sustainable investments to every part of the fixed income market.”

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### About Tabula Investment Management Limited



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Tabula Investment Management Limited (“Tabula”) is an asset manager and ETF provider focused on differentiated strategies. Its current ETFs provide unique solutions in the fixed income space, and help investors achieve greater control of investment risks and rewards. Tabula currently manages over US\$650 million in assets. Tabula is authorised and regulated by the Financial Conduct Authority.