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Press release

Marlene Hassine launches BSD Investing's new tool to help investors improve the performance of their portfolios

BSD Investing, a new independent company dedicated to portfolio research and construction, is launching an innovative tool to help investors generate performance by leveraging on a proprietary database.

“Selecting the right allocation between an active fund and an ETF is just as important to generate performance as to position in the right markets at the right time. Unfortunately, most investors can't make an optimal choice using existing tools,” says Marlène Hassine Konqui, Associate Managing Director of BSD Investing.

Several reasons can be put forward to justify the fact that portfolio managers today find it difficult to choose between an active or passive management approach:

1. Investors may have too dogmatic a view about the merits of each management style. Both management styles can add value.
2. Many of the existing studies comparing the performance between active funds and ETFs are incomplete because they do not take into account the costs of ETFs and compare funds with different investment objectives.
3. Investors do not have a quality database to make an optimal selection of funds.
4. Investors do not have access to rankings of the best active funds and ETFs by indexation

“For ten years, I have met hundreds of investors across Europe: asset owners, institutional investors, and wealth managers. Many of them have expressed to me their wish to have a tool that helps them allocate their portfolio between active funds and ETFs,” says Hassine Konqui.

“Academic research has proven that the combination of active funds and ETFs within a portfolio is key to enhancing performance. However, the question of the combination of the two management styles remains unanswered to this day. This is why the creation of an allocation tool on the market meets a real need for investors”,



said Serge Darolles, Professor of finance, director of Masters in Finance, Université Paris Dauphine – PSL.

BSD Investing's tool fills this gap by giving investors access to all of the information critical to making optimal investment decisions and driving performance. Thanks to its proprietary database, which is unique in the market, BSD Investing provides regular allocation recommendations analyses and rankings of the best active funds and ETFs. Very soon, a portfolio allocation simulation tool will be available on the site.

Media contacts :

Marlène Hassine Konqui
Associate Director General
Marlene.hassine@bsdinvesting.com

Valerie Dieuaide Lalonde
Consultant Communication Senior - Agence MCactus
Valerie.dieuaide@bsdinvesting.com

Notes for editors
www.bsdinvesting.com

Marlene Hassine Konqui is Associate Director General at BSD Investing. She is a financial analyst and member of the SFAF, the French association for financial analysis. She has become a leading active passive portfolio construction expert with 28 years of experience at Exane, ODDO, Kepler Equities, Société Générale and Lyxor ETF. Recognized by the industry as a pioneer in active/passive allocation fund research, she was voted one of the three best ETF researchers in Europe by Investment Week.

BSD Investing is an independent company dedicated to research and portfolio construction. It is the only company on the market to provide reliable data on the allocation of active and passive funds. BSD Investing aims to help investors outperform thanks to a proprietary database, unique in the market. BSD Investing provides access to its proprietary database, research reports and interactive analysis platform covering 11,000 funds domiciled in Europe across 31 different investment universes over a 20-year period. BSD Investing is part of BSD Finances, a limited



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liability company registered in France with registered number 852 716 547 00017. Its registered office is at 8 rue de Moscou 75008 Paris.



Marlene Hassine Konqui



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