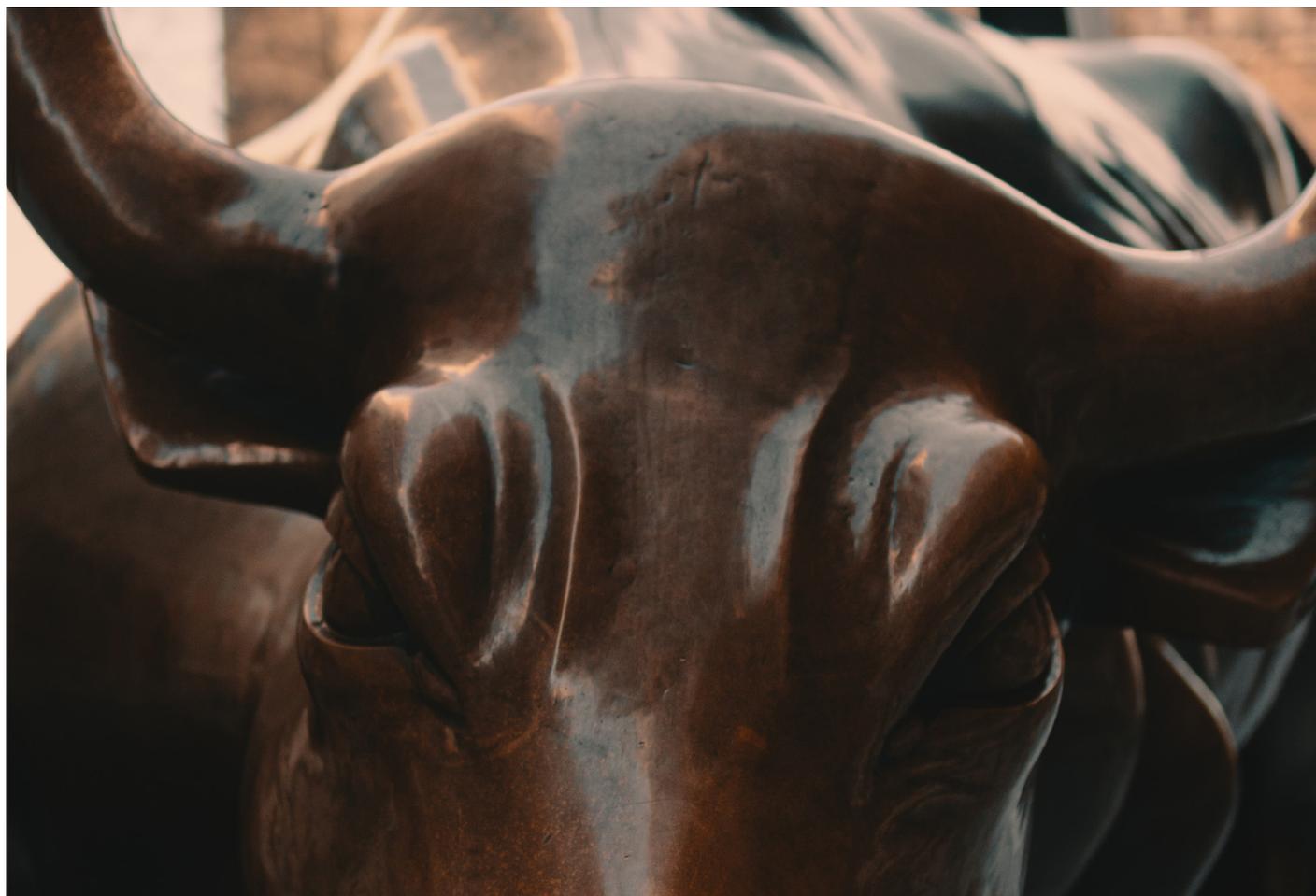


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Through innovative technologies Arca Fondi SGR has set up new processes that have improved the relationship with customers and increased productivity and performance.

  
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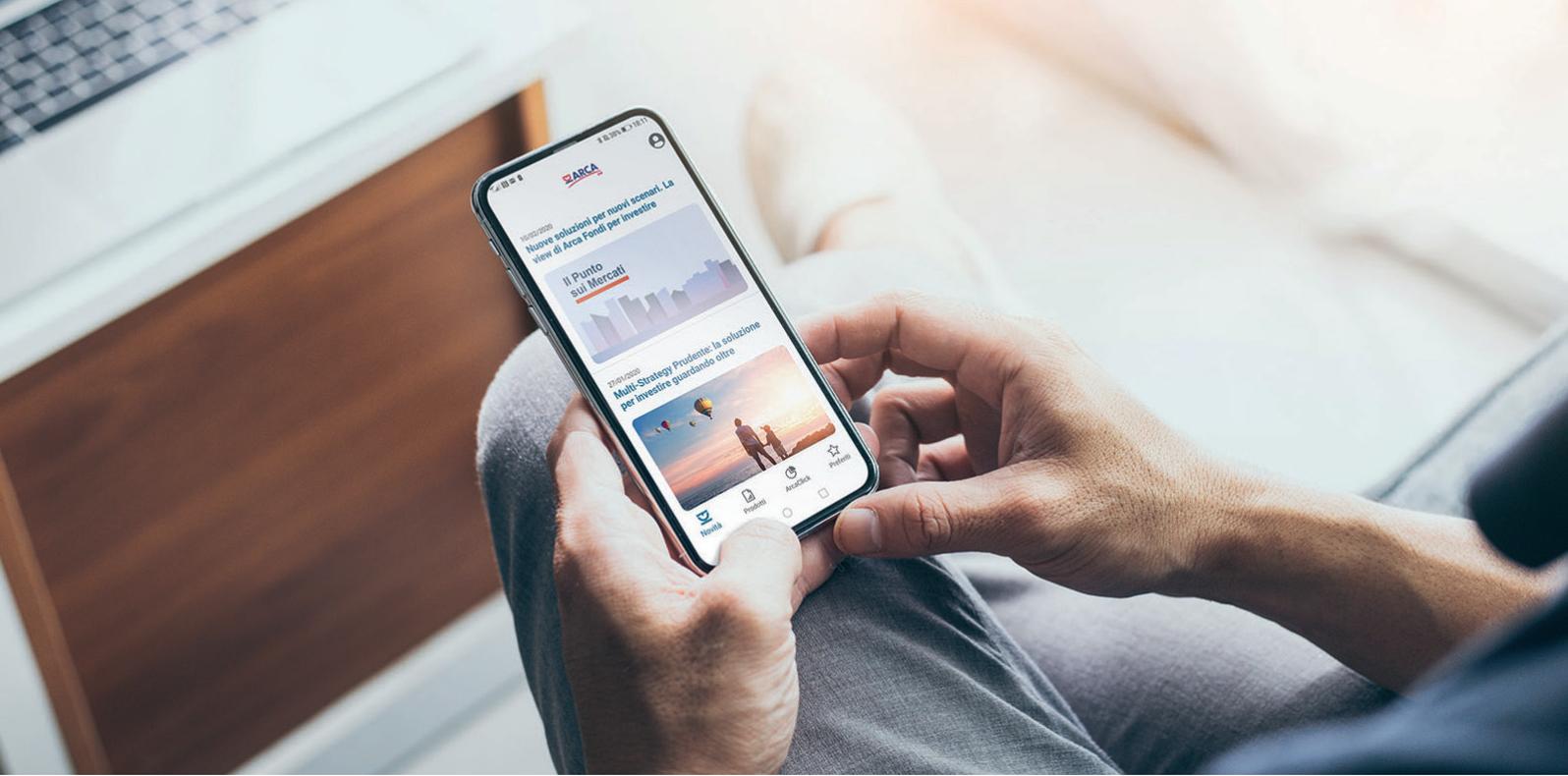


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# COLLABORATION FOR INNOVATION

## THE COMPANY

Arca Fondi SGR is an Italian active asset management company, founded in 1983 by the association of 12 cooperative banks. Today, Arca Fondi manages around €32 billion divided between mutual funds, pension funds, and institutional accounts. Thanks to a network of distributors made up of more than 100 banks and other financial institutions scattered throughout the country, its client base is made up of over 800 000 investors. With almost forty years of experience, Arca has established itself as one of the country's main asset managers.

## THE PEOPLE

The strength of Arca Fondi is its people. Teams who continuously improve themselves to achieve corporate goals. The corporate culture nurtures talent in an environment that encourages self-improvement and striving for excellence. Thanks to numerous innovative processes implemented in recent years, the customer has been placed at the centre of every single activity. The professionalism and creativity of all employees make Arca Fondi the ideal partner for the investor looking for reliability and safety.

## THE FUNDS

Innovation has been at the heart of Arca Fondi's business model since its beginning. After the introduction of the law that established mutual funds in Italy (Law 77/1983), Arca was among the first asset managers to be created in the country. The first two funds, Arca RR and Arca BB, were launched a year later in 1984. Even today, these two funds are real blockbusters, with an impeccable track record and a more than sevenfold increase in the net asset value. In 1998, the pension fund, Arca Previdenza, landed. In addition to being one of the first open pension funds in Italy, today it is also the largest in the country.

In 2015, Sidera Funds Sicav was created, a Luxembourg-based platform dedicated to private and affluent customers. Two years later, the PIR funds (Piani Individuali di Risparmio), a segment dedicated to investments in the Italian "real economy", made their debut. In a short time, Arca also conquered leading positions in this market.

Finally, in 2019 Arca signed the United Nations Principles for Responsible Investment (UNPRI), an important first

step that led to the creation of a range of ESG funds and an innovative proprietary ESG Rating system.

## THE SERVICES

The innovation, however, is not limited to financial products, but also in creating new services for its partners. Arca Fondi has generated a digital ecosystem that can support and guide its distributors and customers.

The website, *Arcaonline.it*, has recently undergone an important redesign to improve the user experience through any device. On the website, the partners can find all the relevant information required to support operations. In addition, there is a section dedicated to all the Arca Fondi products that can be viewed by anyone and provides information on the performance and composition of the funds and much more.

The site is also an archive of all Arca's commercial and multimedia production. You can find videos that comment on the performance of the markets or sectors, but also exclusive and always updated reports. These materials are shared through dedicated newsletters



and using Arca's social media channels which cover a series of initiatives as well as being a tool for advertising campaigns, often in collaboration with partner banks. Moreover, Arca has recently launched a financial education project entitled *3 minutes with Arca*, a blog that aims to help readers easily understand the risks and opportunities of the markets.

ArcaClick is the area dedicated to all customers who own Arca funds. With the latest facial recognition technologies, the registration process has recently been improved. The procedure can be carried out independently with a personal device or at the bank. ArcaClick allows the customer to have their portfolio, documents and all their practices under control. Those who join the pension fund can also quickly pay their contributions online if they wish. ArcaClick is also accessible from the Arca Fondi App, a free and constantly updated application available on both iOS and Android. The app is an important tool especially for the growing centrality of smartphones in all of our lives. Customers can always have their portfolio under control or read the latest news, discover the fund manager's videos and much more.

### THE LAB

In 2019, Arca created a new internal division called InnovAction Lab to further grow in the Italian market while facing up to the challenges of the future. InnovAction Lab focuses on improving processes using the latest technologies, data analysis and by making the customer the centre of attention. Over the past year, several projects have been put in place to improve relations with partners and customers.

An internal data warehouse has been created which represents the real brain of all commercial and analysis operations. To make the most of its potential, it's been integrated with a latest-generation CRM, adapted to the needs of an asset manager. To support commercial partners, new innovative solutions have been created such as a Smart Advisor to help distributors sell the most suitable products for customers. Recently a ChatBot, called Sara, has been developed to help anyone in the search for information on the Arca world through the website, WhatsApp or Telegram.

InnovAction Lab is a division that makes colleagues' collaboration the central part of its work. Everyone works side by side to bring different experiences to reach the most efficient conclusion. One of the main focuses is sustainability. For example, the rethinking of many processes has led to better integration and, above all, has been able to reduce paper consumption.

Today, many of these solutions have become realities that can be appreciated by both Arca Fondi's customers and distribution partners. But this is only the beginning. Thanks to talent and technology, Arca's ecosystem is constantly evolving to guarantee the most efficient and safe experience.

