

Shareholder Value Management AG

it's all about value...

Shareholder Value Management AG is a manager-owned value investing firm based in Frankfurt, Germany.

We advise several funds and mandates with a volume of about EUR 3,0 billion in total under the liability umbrella of NFS Netfonds Financial Service GmbH i.e.: Frankfurter Aktienfonds für Stiftungen; PRIMA – Globale Werte; Frankfurter Stiftungsfonds; Frankfurter Value Focus Fund. Moreover, we support the Share Value Stiftung, a non-profit foundation, and Shareholder Value Beteiligungen AG.

Our investment strategy focuses on investing in undervalued companies with business owners and structural economic moats, which we believe help reduce investment risks while maintaining capital opportunities. We service our funds with two key objectives in mind – preservation and growth of capital. Our strong long-term track record is attributed to our highly disciplined and proprietary investment process, which has continued to develop consistently since the 1980s. Our funds, furthermore, apply an active hedging and derivative strategy that utilizes market and sentiment indicators (behavioral finance elements) to actively manage risk and return.

Core skills

- Value-Investing
- Active hedging and derivatives strategies
- Inclusion of sustainability criteria

Fund of the month

Frankfurter Aktienfonds für Stiftungen

Investments are made primarily in undervalued stocks with a safety margin to minimize risk to investors while maintaining high return opportunities. The main focus is on European small and mid caps with a regional focus in the German-speaking region. The fund serves the long-term preservation and development of the assets of its investors.

Valor (Anteilklasse T): 3723247

ISIN (Anteilklasse T): DE000A0M8HD2

Current Factsheet of the month,

[Factsheet Shareholder Value](#)

All Fonds at a glance

<https://shareholdervalue.de/>

Contact



Philipp Prömm

Vorstand & Head of Sales

T +49 (0)69 669 830 18

M +49 (0)163 609 02 47

pp@shareholdervalue.de
www.shareholdervalue.de



Endrit Çela

Relationship Manager

T +49 (0)69 669 830 257

M +49 (0)171 846 79 29

ec@shareholdervalue.de
www.shareholdervalue.de



Micha Siegle

Client Support Manager

T +49 (0)69 669 830 259

ms@shareholdervalue.de
www.shareholdervalue.de

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