

## Swiss Life Asset Managers completes its acquisition of a significant stake in Helrom

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Swiss Life Asset Managers completes the acquisition of a significant equity interest in Frankfurt based railroad and technology company Helrom. The investment further supports the development of climate-neutral, long-distance transport in Europe.

The acquisition of a significant stake in Helrom GmbH by Swiss Life Asset Managers was closed today. Swiss Life Asset Managers becomes an anchor investor supporting Helrom's growth ambitions to serve a number of European freight corridors.

Headquartered in Frankfurt, Helrom is a licensed railroad operator which owns a patented proprietary wagon technology allowing the efficient loading of semi-trailers onto a rail wagon without requiring a crane or extensive terminal infrastructure. Owned by its management team and family & friends investors, Helrom has been able to demonstrate proof-of-concept by operating a railroad corridor between Vienna and Düsseldorf since January 2021. Due to the demonstrated success of Helrom's proprietary technology and transport reliability, Helrom is looking to scale its business on different routes across Europe, targeting significant unmet demand for the rail transportation of semi-trailers in Europe. Helrom's transport system incorporates a simple operating schedule that, unlike conventional rail freight, does not involve complex train rotations. This leads to a degree of on-time performance and reliability that is unique in the market.

For Swiss Life Asset Managers, the financing of these growth plans is especially attractive because of its large market potential and technological leadership, underpinned by global patents and long development leads. Semi-trailers account for 75 percent of European road-based transportation, which dominant European freight transportation, but only 2 percent of all semi-trailers are currently using rail.

Helrom offers its customers eco-friendly transport at highest reliability on European long-haul corridors. Above all the Helrom Trailer Rail represents a market-

ready technology for achieving climate-neutral Net Zero Transport in Europe. A freight train requires only about 20 percent of the energy of a truck and produces only about 25 percent of its climate-damaging emissions. No means of transportation currently has a higher share of electromobility. Today, 92 percent of rail transport is already electric.



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To meet climate targets, European governments support intermodal rail transport with public policies as it contributes to the reduction of carbon emissions and decreases congestion on roads.

Christoph Manser, Head Infrastructure Equity International at Swiss Life Asset Managers, stated: "One of the core pillars of Swiss Life Asset Managers' investment strategy is to contribute to the decarbonisation of our society by supporting companies which have a positive impact on the environment. Our long-term view on the investment and the accumulated experience in the railway sector will provide strong support to Helrom in reaching its growth and development goals."

Sinisha Ponzio, Infrastructure Portfolio Manager at Swiss Life Asset Managers, added: "We are excited to start working with Helrom's experienced Management in order to contribute to the company's growth plans. As a long-term investor, we are delighted to add Helrom as one of our portfolio companies, as it represents a high-quality growth infrastructure asset. With Helrom being one of the innovation leaders in the cargo railway sector in Europe, Swiss Life Asset Managers is proving its continued confidence in the European transport economy."

Roman Noack, CEO of Helrom, sees Swiss Life Asset Managers' investment as a decisive milestone: "I am excited that we can take an important step in our development with one of the large infrastructure funds in Europe as the anchor investor. Swiss Life Asset Managers' engagement underlines our goal of making Helrom Trailer Rail the supporting infrastructure for climate-neutral, long-distance transport in Europe. I am grateful that our original investors recognised the potential to become the infrastructure for Net Zero Transport and that our team delivered the reliable transport service. Together with Swiss Life Asset Managers, we are now embarking on scaling up our model."

## Information

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### Swiss Life Asset Managers

Swiss Life AM has more than 160 years of experience in managing capital on behalf of the Swiss Life Group and its clients. The investment philosophy of Swiss Life AM focuses on principles of long-term strategic approach, capital preservation, generation of consistent and sustainable returns as well as a responsible approach to risks. Swiss Life AM offers its asset management expertise to third-party clients in Switzerland, France, Germany, Luxembourg and the UK. As at 31 December 2021, assets managed by Swiss Life on behalf of third-party clients amounted to €99 billion. Together with the investment mandates for the Swiss Life Group, total assets under management by Swiss Life AM stood at €266 billion, of which €7.3bn is managed by the Infrastructure Equity Business area. Swiss Life AM has a dedicated infrastructure team of more than 42 investment professionals, focusing on investments in global infrastructure assets including renewables and a proven track record in creating value for its clients.

Swiss Life Asset Managers employs more than 2500 people in Europe.

### Self-determined Life

Swiss Life enables people to lead a self-determined life and look to the future with confidence. Swiss Life Asset Managers pursues the same goal: We think long-term and act responsibly. We use our knowledge and experience to develop future-oriented investment solutions. This is how we support our customers in achieving their long-term investment objectives, which in turn also take account of their client's needs so they can plan their financial future in a self-determined manner.

### Helrom

Helrom is a rail freight and technology company based in Frankfurt. With our worldwide patented freight wagon technology, we are making it possible for the first time for European long-distance transport to switch between road and rail in a barrier-free way - without large investments in terminals and close to the customer.

We are currently operating a very successful connection between Düsseldorf and Vienna with the HELROM Trailer Rail for semi-trailers. We work for CO2-neutral freight transport in Europe. Net Zero Transport is our mission.

### Disclaimer

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