

Press release

Éric Bertrand appointed Chief Executive Officer of Ofi Invest Asset Management

Ofi Invest Asset Management, a subsidiary of Ofi Invest, the fourth-largest French asset manager⁽¹⁾, continues its push forward in announcing a change in its governance. Effective on 27 March 2026, Éric Bertrand, Deputy Chief Executive Officer and Chief Investment Officer, has been appointed Chief Executive Officer of Ofi Invest Asset Management. Jean-Pierre Grimaud, who had served as Chief Executive Officer of Ofi Invest and Ofi Invest Asset Management, will henceforth devote himself fully to the role of Chief Executive Officer of the Ofi Invest group.

Ofi Invest Asset Management, which was formed on 1 January 2023 from the merger of OFI AM and Abeille Asset Management (ex-Aviva Investors France), now has €187.1 billion in assets under management⁽²⁾, out of the €210.2 billion in AuM⁽²⁾ of Ofi Invest, alongside Ofi Invest Real Estate (€10.2 billion⁽²⁾) and the private asset management services (€12.9 billion⁽²⁾) of Swen Capital Partners and Zencap Asset Management.

Ofi Invest Asset Management's AuM has expanded robustly since its founding, increasing of nearly 20% in 3 years⁽²⁾.

2025 was a year of particularly strong growth for Ofi Invest Asset Management, with AuM expanding of nearly €10 billion. Its €2.4 billion in inflows in 2025 was driven mainly by money-market, metals strategies, and the expansion of separately managed accounts, in which AuM now exceeds €1billion.

Ofi Invest Asset Management has more than 360 employees serving institutional and retail investors, backed by distribution networks and partners. It offers a broad selection of investment strategies across all liquid asset classes as part of a responsible and engaged management style. It also possesses recognised know-how in bespoke management, as well as skills in bringing together Ofi Invest's various capabilities.

Jean-Pierre Grimaud, Chief Executive Officer of Ofi Invest said: *"In three years, Ofi Invest Asset Management has achieved a milestone with the successful integrations of Abeille Asset Management and then Egamo. This change in scale has opened up new opportunities while preserving what makes us unique: the quality of our service and the proximity with our clients. Ofi Invest Asset Management is now solidly positioned in its growth trajectory. I am very happy to entrust the reins of Ofi Invest Asset Management to Éric Bertrand, with whom I have worked closely for many years. During those years, I have come to appreciate his energy, pragmatism and ability to get everyone together behind value-creating initiatives. This transition, which has been prepared over some time, is a natural extension of our strategy. Éric has already played a major role in our governance set-up as Deputy Chief Executive Officer. His experience and strategic vision make him the natural choice to lead Ofi Invest Asset Management in achieving its goals. As for me, I will now devote myself fully to my responsibilities as the head of the Ofi Invest group."*

Éric Bertrand, Chief Executive Officer of Ofi Invest Asset Management said: *"I am pleased and honoured to assume the role of CEO of Ofi Invest AM. I take on this new role with enthusiasm and determination, while pursuing the growth trajectory established under the leadership of Jean-Pierre Grimaud and with the support of our shareholders. I will have the benefit of a solid foundation and the remarkable work achieved by all the teams. The coming years will be marked by in-depth transformations – both*

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⁽¹⁾ Source: Group financial communications, and following the integration of AXA IM into the BNP Paribas group on July 1, 2025.
⁽²⁾ Source: Ofi Invest as of 12/31/2025, before the integration of the managed discretionary mandates (€1.1bn) and the committed but not yet invested assets (€500m), which would bring the Ofi Invest's AUM to €211.8bn.



geopolitical and technological (AI, tokenisation, stablecoins, among others) – that will fashion new needs and new practices. After almost 10 years as Chief Investment Officer and five as Deputy Chief Executive Officer, I know how to rely on men and women who are committed and creative and hold themselves to high standards. Their expertise is decisive in our ability to offer tomorrow’s investment services and solutions while ensuring that these remain simple and accessible to our clients. Speed of execution, quality of service, and keeping one step ahead while remaining pragmatic will, without a doubt, continue to be the keys to what makes us different.”

Éric Bertrand (55 years old), has served as Deputy Chief Executive Officer and Chief Investment Officer of OFI AM since 2021 and then of Ofi Invest Asset Management since 2023. He joined OFI AM in 2016 as Head of Fixed Income and Diversified Management. He previously served as Deputy Chief Investment Officer at CPR AM, which he joined in 1994. He began as a money-market manager, arbitrage trader and then corporate and government bond manager in 2000. Éric Bertrand is an actuary graduate of the Institut de science financière et d’assurances (ISFR) and started out as an actuarial research analyst at Comptoir des Entrepreneurs.

ABOUT OFI INVEST ASSET MANAGEMENT

Ofi Invest Asset Management is a company of Ofi Invest, the asset management division and one of Aéma Groupe’s four brands alongside Macif, Abeille Assurances and AÉSIO mutuelle.

Ofi Invest Asset Management has more than 187 billion euros in assets as of end-December 2025⁽³⁾ and more than 360 employees, serving institutional and individual investors through networks and distribution partners in France and abroad.

Very attached to its convictions as a responsible and committed investor, Ofi Invest Asset Management offers a wide choice of responsible investment strategies to enable its clients to finance the development of a responsible and sustainable economy that is a source of opportunities and performance.

By bringing together the capabilities of Ofi Invest group’s asset management companies (the fourth-largest French asset manager⁽⁴⁾), Ofi Invest Asset Management provides access to a broad range of investment solutions, extensive experience in bespoke asset management, and services adapted to various investor types.

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⁽³⁾ Source: Ofi Invest as of 12/31/2025, before the integration of the managed discretionary mandates (€1.1bn) which would bring the Ofi Invest AM’s AUM to €188.2bn.

⁽⁴⁾ Source: Group financial communications, and following the integration of AXA IM into the BNP Paribas group on July 1, 2025.

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