AXS Names ESG Pioneer Green Alpha and Institutional Income Manager Uniplan as Sub-Advisors of AXS Sustainable Income Fund (AXSKX)

Both managers have a long history of groundbreaking and providing value for investors across all market cycles.

NEW YORK, August 23, 2022 – AXS Investments, a leading asset manager providing access to alternative investments for growth, income and diversification, has named two new sub-advisors to the AXS Sustainable Income Fund (AXSKX).

Green Alpha Investments is a recognized leader in innovation oriented, sustainable investing and created first-of-its-kind access for individuals to Next Economy™ investments. Green Alpha has been managing ESG-friendly* investments since 2008 with their low-turnover, value-conscious strategies that seek to identify companies whose products and services sustainably address the global economy’s greatest system-level risks.

Uniplan Investment Counsel is a longtime institutional manager of low-correlation alternative strategies focused on REITs, micro-caps, and dividend paying stocks. Founded in 1984, Uniplan has a robust history of providing fixed income and alternative investment strategies for pensions, endowments, foundations and other institutional investors.

“We are excited to partner with both Green Alpha and Uniplan, bringing each firm’s expertise to the AXS Sustainable Income Fund” said Greg Bassuk, Chief Executive Officer of AXS Investments. “With the fund’s time-tested approach of generating income through sustainable, ESG-focused investments, we believe that the breadth and depth of experience that both Green Alpha and Uniplan drive income, growth and diversification to our investors.”

*Environmental, social and corporate governance (ESG) investing focuses on companies that support environmental protection, social justice and ethical management practices.

About AXS Investments

AXS Investments is a leading alternative investment manager providing a diversified family of alternative investments for growth, income and diversification. The firm empowers investors to diversify their portfolios with investments previously available only to the largest institutional and high net worth investors. The investor-friendly AXS funds are time-tested, liquid, transparent and managed by high pedigreed portfolio managers with long and strong track records. For more information, visit www.axsinvestments.com.

About Green Alpha Investments

Green Alpha is led by three pioneering executives who each have 20+ years of investment management leadership experience. Green Alpha has been redefining asset management since 2008 by investing in the Next Economy™ – an indefinitely thriving economy driven by companies developing innovative solutions to major systemic risks, like the climate crisis, resource degradation, widening inequality, and human disease burdens. It believes companies delivering Next Economy ideals are the greatest growth drivers of the 21st century; consequently, they are the chief opportunity for investments that preserve and grow clients’ purchasing power. Green Alpha Investments owns the trademark to Next Economy™.

About Uniplan Investment Counsel

Uniplan is a leader in alternative investments for more than 25 years. Founded in 1984, the firm has provided diversified portfolio strategies to wealthy individuals, small companies, and institutions. Uniplan offers sophisticated, specialized investment advisory management services and sub-advisory services on both a discretionary and non-discretionary basis customized and tailored to the specific needs of each client. The firm’s investment solutions have been widely adopted across the institutional investment landscape.

There are risks involved with investing including the possible loss of principal. Past performance does not guarantee future results. Diversification does not ensure profits or prevent losses. Investors should carefully consider the investment objectives, risks, charges and expenses of the fund before investing. To obtain a prospectus containing this and other important information, please click here to view or download a prospectus online. Read the fund’s prospectus carefully before you invest.
The market price of a security may decline due to general market conditions that are not specifically related to a particular company, changes in the general outlook for corporate earnings, changes in interest or currency rates, or adverse investor sentiment. The prices of fixed income securities respond to economic developments as well as to changes in an issuer’s credit rating or market perceptions about the creditworthiness of an issuer. High yield bonds are debt securities rated below investment grade and are speculative, involve greater risks of default, downgrade or price declines and are more volatile and tend to be less liquid than investment-grade securities. While the Sub-Advisers believe that the integration of ESG analysis as part of the investment process contributes to its risk management approach, the Fund’s consideration of ESG criteria in making its investment decisions may affect the Fund’s exposure to risks associated with certain issuers, industries and sectors, which may impact the Fund’s investment performance.

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