

Press Release

AJ Bell extends its partnership with Amundi and selects Amundi Technology to enhance portfolio management solutions

London, 15th May 2025 — Amundi, the leading European Asset Manager and AJ Bell, one of the largest investment platforms in the UK, widen their partnership as AJ Bell has chosen the ALTO Investment platform from Amundi Technology to streamline its portfolio management processes and support its ambitious growth plans.

AJ Bell Investments, known for its wealth management solutions catering to the needs of retail investors as well as high-net-worth individuals and institutional clients, recognised the need for a robust and scalable system to support its growth plans as assets under management reached £7.5 billion as at its last trading update.

Amundi Technology is set to address these challenges by offering a portfolio management system that integrates seamlessly with AJ Bell's existing operations. The key benefits of this partnership include:

- **Enhanced Efficiency:** By transitioning from manual processes to an automated system, AJ Bell will significantly improve operational efficiency.
- **Scalability:** The new solution will provide AJ Bell with the flexibility to scale its operations as it grows, ensuring it can meet the increasing demands of its clients.
- **Integrated Services:** AJ Bell will benefit from a unified operating model that combines technology, data management and dealing services, allowing for a more streamlined and cost-effective approach to portfolio management.

Ryan Hughes, Managing Director at AJ Bell Investments stated, *"We are delighted to partner with Amundi Technology as we continue to grow our business. The technology platform provided by Amundi will significantly improve our operational efficiency and facilitate our future growth as we look to capitalise on the continued demand for our simple, transparent and low cost investment solutions."*

Benjamin Lucas, CEO of Amundi Technology, stated, *"We are thrilled to welcome AJ Bell, a longstanding client of Amundi, on our technology platform. Our technology solutions are designed to empower asset managers to achieve their goals efficiently and effectively. This new development of our partnership showcases our commitment to providing solutions across the entire value chain and reinforces our position as a leading provider of asset management technology services."*

About Amundi

Amundi, the leading European asset manager, ranking among the top 10 global players¹, offers its 100 million clients - retail, institutional and corporate - a complete range of savings and investment solutions in active and passive management, in traditional or real assets. This offering is enhanced with IT tools and services to cover the entire savings value chain. A subsidiary of the Crédit Agricole group and listed on the stock exchange, Amundi currently manages more than €2.2 trillion of assets².

With its six international investment hubs³, financial and extra-financial research capabilities and long-standing commitment to responsible investment, Amundi is a key player in the asset management landscape.

Amundi clients benefit from the expertise and advice of 5,700 employees in 35 countries.

Amundi, a trusted partner, working every day in the interest of its clients and society



About Amundi Technology

Amundi Technology is a leading provider of technology and services to the financial services industry and part of Amundi Group. Through the ALTO suite, Amundi Technology offers a comprehensive range of solutions, including portfolio management systems, discretionary portfolio management and advisory platforms, savings software, and specialized solutions. They have over 1,200 professionals globally with teams in 19 countries.

The technology platforms provide adaptive solutions that allow clients to focus on their core business, and include ALTO Investment, ALTO Wealth & Distribution, ALTO Sustainability, ALTO Asset Servicing and ALTO ESR.

About AJ Bell

Established in 1995, AJ Bell is one of the largest investment platforms in the UK, operating at scale in both the advised and direct-to-consumer (D2C) markets.

Our purpose is to help people invest by providing them with easy access to Pensions, ISAs and General investment accounts, great customer service and competitive charges.

Our two core platform propositions are AJ Bell in the D2C market and AJ Bell Investcentre in the advised market; which both provide access to a broad investment range including shares and other instruments traded on the major stock exchanges around the world, as well as all mainstream collective investments available in the UK and our own range of AJ Bell funds.

In the D2C market we also offer AJ Bell Dodl, a low cost investment app with a simplified investment range that makes it easier for customers to choose investments and buy and sell them without paying any commission.

For cash savers we offer a Cash savings hub which provides access to a range of competitive savings accounts to help people manage their long term cash deposits.

AJ Bell is headquartered in Manchester, UK, with offices in London and Bristol.

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¹ Source: IPE "Top 500 Asset Managers" published in June 2024, based on assets under management as at 31/12/2023

² Amundi data as at 31/03/2025

³ Paris, London, Dublin, Milan, Tokyo and San Antonio (via our strategic partnership with Victory Capital)