

## Notification to unitholders

Lysa has decided to change its investment strategy for the Lysa Aktier fund from being a fund of funds to becoming an index fund. This change reflects Lysa's objective of simplicity and transparency.

In connection with this change, Lysa is introducing two new funds: *Lysa Emerging Markets Equity Broad* and *Lysa Global Small Cap Equity Broad*.

### Index fund

The Lysa Aktier fund, which is part of Lysa's broad portfolio, is now undergoing a change from being a fund-of-funds to becoming an index fund. The new fund will track the Solactive GBS Developed Markets Large & Mid Cap Index NTR, and in connection with this, the fund will also change its name to Lysa Global Equity Broad. The purpose of the change is to create a clearer focus for the fund and make it easier for investors to monitor the quality of the management. This step reflects Lysa's focus on transparency and simplicity in its management.

The index that the Lysa Global Equity Broad fund will follow is a broad global index and is a so-called net return index, which means that it is adjusted for withholding tax. More information on the relevant index is available from the [index provider](#).

As Lysa Global Equity Broad is now managed as an index fund, it will invest in various underlying assets to achieve a return in line with its index. The main strategy is to invest directly in the stocks included in the index. However, the Fund also has the possibility to use other instruments, such as fund shares and derivatives, for example to manage the Fund's liquidity.

In addition, the Fund has the possibility to lend financial instruments up to an amount corresponding to a maximum of 20% of the Fund's assets. This creates additional potential to maximize returns while managing risks responsibly.

### Implications for you as a unit holder

The changes made to the Fund's focus mean that it will move from being managed as a fund-of-funds solution to becoming an index fund. Despite this change, the Fund will maintain its focus on the global equity market. At the same time, the exposure to emerging markets and global small caps will be moved to two new funds: Lysa Emerging Markets Equity Broad and Lysa Global Small Cap Equity Broad. This move aims to clarify the fund's focus and create an even more focused and transparent investment strategy.

As a shareholder, you do not need to take any action as your fund units will be automatically transferred to the new funds. The updated fund rules will enter into force on November 19, 2024, and the changes will be implemented without any action on your part.

If you no longer wish to hold your Lysa Global Equity Broad units, you can redeem them free of charge, both before and after the new fund rules come into force. If you wish to do so, you can do so by changing your portfolio allocation or closing your Lysa account. We are here to help you if you have any questions. However, we would like to draw your attention to the fact that a sale may have tax implications, depending on your specific situation. The updated fund rules are available to read on [lysafonder.se](https://lysafonder.se)