

# News Release

**Contact:**

Meghan Shields  
617.835.7509

[meghan.shields@columbiathreadneedle.com](mailto:meghan.shields@columbiathreadneedle.com)

## **Columbia Threadneedle Enters CLO Equity Investment Agreement with Jefferies-led Consortium**

*New strategic investment agreement aims to grow Columbia Threadneedle CLO platform*

**BOSTON** – February 26, 2024 – Columbia Threadneedle Investments (“Columbia Threadneedle”) today announced that it has entered into a strategic investment agreement to grow its CLO platform with a consortium of investors arranged by Jefferies (“the Consortium”) that includes Columbia Threadneedle’s parent company, Ameriprise Financial.

The Consortium will commit equity capital that will support the issuance of multiple CLOs over the next several years. The agreement builds on an established relationship between Jefferies and Columbia Threadneedle’s CLO platform and will support a model for CLO formation designed to establish Columbia Threadneedle as a serial CLO issuer and further grow its fixed income franchise.

Columbia Threadneedle’s bank loan team manages \$4 billion and includes dedicated portfolio managers, research analysts and traders who manage CLOs and other loan funds. The team’s investment approach is grounded in proprietary, fundamental credit research conducted by bank loan analysts and supported by the firm’s more than 80 strong fixed income research team. Columbia Threadneedle manages over \$238 billion in fixed income assets across a range of single and multi-sector strategies.

Stanton Ray, Head of U.S. Loan Platform at Columbia Threadneedle, said, “We greatly value our relationship with Jefferies and look forward to leveraging this agreement to grow the CLO business and reach more investors in this important asset class.”

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## About Columbia Threadneedle Investments

Columbia Threadneedle Investments is a leading global asset manager that provides a broad range of investment strategies and solutions for individual, institutional and corporate clients around the world. With more than 2,500 people, including over 650 investment professionals based in North America, Europe and Asia, we manage \$637 billion of assets across developed and emerging market equities, fixed income, asset allocation solutions and alternatives.<sup>1</sup>

Columbia Threadneedle Investments is the global asset management group of Ameriprise Financial, Inc. (NYSE: AMP). For more information, please visit [columbiathreadneedleus.com](https://columbiathreadneedleus.com).

Columbia Threadneedle Investments (Columbia Threadneedle) is the global brand name of the Columbia and Threadneedle group of companies.

<sup>1</sup> As of Dec. 31, 2023.

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