



# Press Release

Brussels, 8 April 2024 – 3 p.m.

## **KBC offers new features to customers using Matti, Bolero's smart investment assistant.**

**Matti users will now be offered new possibilities with the support of Kate in KBC Mobile or via the Bolero platform.**

KBC has something for every type of investor, ranging from those who make their own investments to those who have their investments managed for them by financial experts. Many investors have a hybrid profile, meaning that some of their assets are managed by KBC's experts. At the same time, they also like to invest some of their assets themselves in listed products via Bolero and/or ETFs via Matti, Bolero's intelligent investment assistant.

The Matti platform is separate from Bolero but, since its launch in 2020, Matti has made good use of the extensive stock market expertise and training opportunities (such as webinars on investing in ETFs) available on the Bolero platform. This innovative platform has ensured KBC a place among the technological frontrunners in this field. Bolero, which is celebrating its 25th anniversary this year, was crowned 'Best Online Broker' by Bankshopper.be from 2015 to 2019 and received the award for 'Best Investment Bank' from spaargids.be in 2021, 2022 and 2023.

Today, both the market for automated investment advice and the technology used by KBC are strong enough to be integrated into KBC Bank's digital investment offering, opening it up to a wider audience.

### **Receive investment advice via Kate in KBC Mobile (from spring 2024)**

In the future, Matti users will be able to turn to Kate, the digital assistant in KBC Mobile, to receive advice from KBC Bank that is in line with their risk profile. They can buy into a diversified fund tailored to their needs and have their investments managed automatically. Kate also offers customers a simple and integrated user experience when it comes to investments and continues to learn every day. Going forward, Kate will also be able to proactively deliver digital investment advice to customers in KBC Mobile.

If necessary, customers can also opt for investment advice from an expert at KBC Live or their local bank branch.

## Make your own investments via Bolero

Matti users who want to manage their own investments can have the ETFs in their Matti portfolio transferred to a Bolero portfolio at no charge. At present, most Matti users already have a Bolero portfolio. Bolero offers a user-friendly platform and convenient app to place stock market orders and follow the latest stock market news. Since the middle of last year, Bolero has also been offering an attractive selection of the most traded ETFs (50 or so) via an ETF playlist at very competitive rates, something that is highly appreciated by Bolero customers of all ages. Consequently, ETF investments are the second largest product group in Bolero after individual shares (in terms of number of transactions).

## Opting for cash

Matti users can also sell their existing ETF portfolio and transfer the cash proceeds to their usual contra account.

Werner Eetezonne, Bolero CEO: *'At Bolero, we constantly strive to make the investor's life as easy as possible by offering wide-ranging stock market information and easy-to-use tools. Matti users will now be offered new features with the support of Kate in KBC Mobile or via the Bolero platform. We will inform them personally about the various options available.'*

All customers will receive a personal communication with details of the various options.

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