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## **CALAMOS INVESTMENTS TEAMS WITH NBA SUPERSTAR GIANNIS ANTETOKOUNMPO TO DELIVER POSITIVE SOCIETAL RETURNS THROUGH THE LAUNCH OF NEW SUSTAINABLE FUNDS**

**Metro Chicago, IL, Feb. 6, 2023** – John Koudounis, President and CEO of [Calamos Investments](http://Calamos Investments), announced that the global investment management firm has partnered with NBA superstar Giannis Antetokounmpo with the shared aim to inspire, drive greatness and contribute to a better world. One step, one leap and one shot at a time, the firm under Koudounis' leadership is teaming with Antetokounmpo to leverage their successes to try to make a difference and have a positive impact on society. To meet this goal, together, they are launching the new Calamos Antetokounmpo Sustainable Equity Funds, a suite of ESG funds that will be publicly accessible to investors.

John Koudounis and Giannis Antetokounmpo share the goals of economic empowerment, financial education, and giving back, especially to young people in the community. To that end, the Calamos Antetokounmpo partnership, structured as joint venture adviser, Calamos Antetokounmpo Asset Management LLC, of which each of Calamos Investments and Giannis Antetokounmpo is a 50% co-owner, seeks to donate a portion of its profits to charity, and the funds will follow ESG investment principles.

"I'm grateful for this partnership since it allows us the opportunity to deliver impact on the grandest scale and leave a legacy of a better world for my children and all young people because they are the future. John and I share the principles of family, community, and economic empowerment," Antetokounmpo said.

"The values that Giannis and I share forge the foundation for a great partnership. We chose to work together because we are both deeply passionate about our goals. We aspire to have a positive impact in the community and the world today in ways that can lead to greater wellbeing and a brighter tomorrow," Koudounis said.

This new suite of ESG funds will enable investors to participate in a product that focuses on performing – striving to beat the S&P 500 with lower risk over the long term -- and seeking to deliver positive societal impact. Calamos will apply its proprietary environmental and impact scoring system that assesses a company's ability to effectively

mitigate environmental, social and governance risk, evaluating six categories: product contribution, life cycle innovation, operational efficiency, inclusive finance, ensuring health, and basic services.

The funds will be managed by sustainable investing pioneers Anthony Tursich, James Madden and Beth Williamson, 30-year industry trailblazers who were among the earliest portfolio managers in the US to assess “non-financial” criteria within their investment selection process. These criteria could include how a company interacts with its community, environment and employees.

Antetokounmpo will not make investment decisions in the funds, but he will serve on the adviser’s board of directors. He will play a role in setting the direction of the fund and partnership’s mission, as well as shaping the joint venture’s targeted annual charitable contribution.

The funds are available through mutual fund and ETF vehicles, enabling access by individual investors as well as institutions of all sizes. The ETF will trade on the NYSE Arca under the ticker symbol SROI. The ticker of the mutual fund’s institutional class is SROIX. Both display the acronym for societal return on investment.

These innovative new funds are a hallmark of the tenure of John Koudounis, who assumed the position of Calamos CEO in 2016 and has more than 25 years of experience on Wall Street. Since joining the firm, Koudounis has more than doubled its assets under management (AUM), from roughly \$18 billion to over \$36 billion (as of 1/31/23). He continues the expansion of Calamos’ actively-managed product offerings to meet growing investor demand. Founded in 1977, Calamos pioneered investing in convertible securities and liquid alternatives, and has been a major player in the market for nearly a half-century.

### **About Calamos**

Calamos Investments is a diversified global investment firm offering innovative investment strategies including alternatives, multi-asset, convertible, fixed income, equity, and sustainable equity. The firm offers strategies through separately managed portfolios, mutual funds, closed-end funds, private funds, and UCITS funds. Clients include major corporations, pension funds, endowments, foundations and individuals, as well as the financial advisors and consultants who serve them. Headquartered in the Chicago metropolitan area, the firm also has offices in New York, San Francisco, Milwaukee, Portland (Oregon), and the Miami area. For more information, please visit [www.calamos.com](http://www.calamos.com).

\*Calamos Investments LLC, referred to herein as Calamos Investments®, is a financial services company offering such services through its subsidiaries: Calamos Advisors LLC, Calamos Wealth Management LLC, Calamos Investments LLP, Calamos Financial Services LLC, and Calamos Antetokounmpo Asset Management LLC.

## **About Giannis Antetokounmpo**

Giannis Sina Ugo Antetokounmpo is a Greek-Nigerian professional basketball player, winning countless awards and honors since joining the NBA in 2013. He is one of the decorated players in the history of the NBA and became a minority owner of the Milwaukee Brewers in 2021.

Antetokounmpo is known for his philanthropic work through his family's foundation, CAFF, named after his late father Charles Antetokounmpo. In 2020, he pledged to give \$100,000 to the staff of Fiserv forum, who could not work during the suspension of the NBA season. He also donated 20,000 masks during the height of the pandemic to Greece.

**Before investing, carefully consider the fund's investment objectives, risks, charges and expenses. Please see the prospectus and summary prospectus containing this and other information which can be obtained by calling 1-800-582-6959. Read it carefully before investing.**

Environmental, social and governance (ESG) is based on the premise of investing in companies that have good environmental records, are ethically run and have a positive social impact.

An investment in the Fund(s) is subject to risks, and you could lose money on your investment in the Fund(s). There can be no assurance that the Fund(s) will achieve its investment objective. Your investment in the Fund(s) is not a deposit in a bank and is not insured or guaranteed by the Federal Deposit Insurance Corporation (FDIC) or any other government agency. The risks associated with an investment in the Fund(s) can increase during times of significant market volatility. The Fund(s) also has specific principal risks, which are described below. More detailed information regarding these risks can be found in the Fund's prospectus.

The principal risks of investing in the **Calamos Antetokounmpo Global Sustainable Equities ETF** include, among others: equity securities risk, portfolio selection risk, foreign securities and ADRs risk, emerging markets risk, key-person dependence risk, large, small and mid-sized investing risk, portfolio turnover risk, sector risk, and sustainability (ESG) policy risk. As a result of political or economic instability in foreign countries, there can be special risks associated with investing in foreign securities, including fluctuations in currency exchange rates, increased price volatility and difficulty obtaining information. In addition, emerging markets may present additional risk due to potential for greater economic and political instability in less developed countries.

The **MSCI ACWI Index** is a free float-adjusted market capitalization weighted index that is designed to measure the equity market performance of developed markets and emerging markets.

The Fund's ESG policy could cause it to perform differently compared to similar funds that do not have such a policy. The application of the social and environmental standards of Calamos Advisors may affect the Fund's exposure to certain issuers, industries, sectors, and factors that may impact the relative financial performance of the Fund-positively or negatively-depending on whether such investments are in or out of favor.

Calamos Antetokounmpo Asset Management LLC (“CGAM”), an investment adviser registered with the SEC under the Investment Advisers Act of 1940, serves as the Fund’s adviser (“Adviser”). CGAM is jointly owned by Calamos Advisors LLC and Original C Fund, LLC, an entity whose voting rights are wholly owned by Original PE, LLC which, in turn, is wholly owned by Giannis Sina Ugo Antetokounmpo. Mr. Antetokounmpo serves on the Adviser’s Board of Directors and has indirect control of half of the Adviser’s Board.

Mr. Antetokounmpo is not a portfolio manager of the Fund and will not be involved in the day-to-day management of the Fund’s investments, and neither Original C nor Mr. Antetokounmpo shall provide any “investment advice” to the Fund. Mr. Antetokounmpo provided input in selecting the initial strategy for the Fund.

Mr. Antetokounmpo will be involved with marketing efforts on behalf of the Adviser.

If Mr. Antetokounmpo is no longer involved with the Fund or the Adviser then “Antetokounmpo” will be removed from the name of the Fund and the Adviser. Further, shareholders would be notified of any change in the name of the Fund or its strategy.

The Adviser is jointly owned and controlled by Calamos Advisors LLC and, indirectly, by Mr. Antetokounmpo, a well-known professional athlete. Unanticipated events, including, without limitation, death, adverse reputational events or business disputes, could result in Mr. Antetokounmpo no longer being associated or involved with the Adviser. Any such event could adversely impact the Fund and result in shareholders experiencing substantial losses.

Forside Financial Services, LLC, Distributor

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