

## **Optio acquires share plan platform from Investec Wealth & Investment International**

Optio Incentives scales global offering, reaching 1M participants across 15 stock exchanges. Global expansion supported by the acquisition of Investec Wealth & Investment International's share plan software platform.

**OSLO, NORWAY – June 25** - Optio Incentives, a Nordic fintech specializing in employee equity and incentive programs, has acquired the share plan software platform from Investec Wealth & Investment International, a division of leading international bank and wealth manager Investec Group. The transaction supports Optio's global expansion and accelerates its annual growth trajectory, which has exceeded **80 percent** since inception. It also provides access to long-standing client relationships, a highly scalable infrastructure, and the experienced team behind the platform.

*"With this acquisition, we're expanding our product offering in the UK and South Africa, significantly strengthening our global footprint," says Christoffer Herheim, CEO and co-founder of Optio Incentives. "We're also bringing on board the skilled team behind the platform, ensuring continuity, client knowledge, and deep domain expertise from day one."*

The newly acquired share plan platform currently supports **more than 60 companies listed on the London Stock Exchange** with employee equity and incentive programs, giving Optio direct access to the UK market. In South Africa, the platform remains **white-labelled by the JSE Investor Services**, a leading share registry, custody and investor service provider **Johannesburg Stock Exchange (JSE)**, powering equity programs for a large share of the country's listed and unlisted firms. This deal positions JIS Investor Services as the sole user of Optio's administration software in Africa.

Optio now supports over **500 corporate clients** across Scandinavia, the UK, Italy, DACH, and South Africa, with programs spanning more **than 15 stock exchanges worldwide**. Its platform serves **over one million employees** participating in equity compensation programs.

### **From Norwegian startup to global player**

Founded in 2018 in Oslo by Christoffer Herheim and Mats Gerø, Optio was created to solve a clear gap in the market: the lack of modern, scalable solutions for managing employee equity and stock option plans. At the time, these services were largely offered by large banks and law firms – often expensive, rigid, and ill-suited for today's dynamic workplaces.

*“We saw growing demand for equity-based compensation, but very few tools met companies' real needs,” says Herheim. “We built Optio as a challenger – combining technology, compliance, and user experience in one modern platform.”*

**Today, Optio supports many of the largest listed companies across the Nordic region, DACH, and Southern Europe — and, following this acquisition, also leading corporates in the UK and South Africa.** This breadth of experience across markets and company stages, from growth companies to multinational enterprises — positions Optio as one of the few truly global providers of equity compensation solutions.

The company plans to continue its growth journey through both **organic expansion** – by deepening its product suite and local market presence – **and strategic acquisitions and partnerships.**

*“We believe employee ownership is one of the most powerful drivers of engagement and long-term value creation,” Herheim adds. “This acquisition strengthens our ability to scale globally, supported by robust infrastructure, strong client relationships, and an experienced team that knows this space inside out.”*

## **About Optio**

Optio Incentives combines software and deep expertise to manage equity compensation plans for global companies. Following the acquisition, the company is trusted by over 500 businesses, with equity plans managed across 100+ countries and 15 stock exchanges. Optio’s unique ability to support organisations as they mature — from scale to the public market—sets it apart from other providers. By simplifying the complexities of employee incentive programs, Optio helps companies stay compliant, manage equity globally, report costs accurately, all while maximizing the benefits of their equity compensation plans. In 2024, Optio also launched a dedicated private equity offering, helping firms streamline, digitize, and scale the handling of equity programs across their portfolio.

Read more on [www.optioincentives.com](http://www.optioincentives.com)

## **About Investec**

Investec partners with private, institutional, and corporate clients, offering international banking, investments, and wealth management services in two principal markets, South Africa, and the UK, as well as certain other countries. The Group was established in 1974 and currently has 7,900+ employees. Investec has a dual-listed company structure with primary listings on the London and Johannesburg Stock Exchanges.

## **About the JSE Investor Services**

JSE Investor Services is a leading provider of Share Registry, Custody and Investor Services and a subsidiary of the Johannesburg Stock Exchange (JSE).

<http://www.jseinvestorservices.co.za>

## **Contact**

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