

As at 15 July 2025

Swiss Life Premium Comfort Prime Portfolio Growth

Investment strategy

This portfolio's investment strategy offers investors a global diversified investment generating high investment returns, which have a stabilising effect and add value. The portfolio comprises approximately 30% bonds and real estate funds and approximately 70% equity funds. The bond allocation is hedged against foreign currency risks. The investment funds were selected according to a best-in-class approach and they meet the quantitative and qualitative selection criteria of Swiss Life Asset Managers. They are monitored on a regular basis.

Investment suitability

This portfolio's investment strategy tolerates elevated fluctuations in value and constitutes an elevated risk. The portfolio is suitable for investors who:

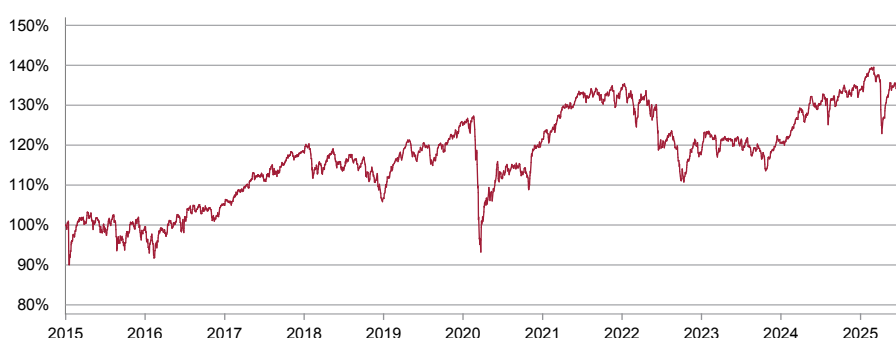
- can accept price fluctuations
- are prepared to accept a higher risk
- are interested in capital growth
- want significant equity exposure

Fund management company	Swiss Life Asset Management AG
Inception date	31 December 2014
Taxable earnings as at 31 December 2022	1.97%
Ongoing charges under PRIIP KID	0.76%

Source: fund management company

As at 15 July 2025

Performance (in CHF)



	2020	2021	2022	2023	2024
Performance p. a.	-2.83%	10.29%	-12.18%	2.47%	11.05%

Source: fund management company

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Portfolio performance

	YTD	1 year	3 years	5 years	10 years	since inception
Performance p. a.	-	0.92%	3.77%	3.12%	2.92%	2.80%
Cumulative performance	-0.06%	0.92%	11.75%	16.61%	33.40%	33.74%
Volatility	9.96%	9.20%	7.61%	7.87%	8.99%	9.34%

Source: fund management company

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Composition of the portfolio

1.	Swiss Life Funds (Lux) - Equity ESG Global High Dividend EUR I Cap	16.00%
2.	Aegon Global Equity Income Fund C USD Inc	13.00%
3.	Pictet CH Solutions Swiss High Dividend - I CHF DIS	12.00%
4.	Vontobel (CH) Sustainable Swiss Dividend AN CHF	12.00%
5.	Swiss Life Funds (CH) Bond Swiss Francs A2	8.00%
6.	Swiss Life Index Funds III (CH) Real Estate Switzerland I Cap	8.00%
7.	Robeco Sustainable Property Equities C EUR	5.00%
8.	Swiss Life Funds (LUX) Equity Europe High Dividend (EUR) I Dis	5.00%
9.	BlueBay Global High Yield Bond Fund Q CHF	4.00%
10.	Swiss Life iFunds (CH) Bond Global Corporates (CHF hedged) I-A2	4.00%
11.	JPM Emerging Markets Dividend I Acc USD	3.00%
12.	M&G (Lux) Global Dividend Fund - EUR C Dist	3.00%
13.	Mirabaud - Sustainable Global Strategic Bond Fund IH cap. CHF	3.00%
14.	Pictet-Global Emerging Debt HI CHF	2.00%
15.	Swiss Life Funds (LUX) Bond Emerging Markets Corporates CHF Hedged I Cap	2.00%

Source: fund management company

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