

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
Ongoing charges under PRIIP KID	0.70%

Source: fund management company

As at 21 May 2026

Performance (in CHF)



	2021	2022	2023	2024	2025
Performance p. a.	10.29%	-12.18%	2.47%	11.05%	6.05%

Source: fund management company

As at 21 May 2026

Portfolio performance

	YTD	1 year	3 years	5 years	10 years	since inception
Performance p. a.	-	8.85%	6.50%	2.48%	3.81%	3.42%
Cumulative performance	3.32%	8.85%	20.82%	13.05%	45.41%	46.65%
Volatility	8.12%	6.50%	7.41%	7.77%	8.59%	9.17%

Source: fund management company

As at 21 May 2026

Composition of the portfolio

1. Pictet CH - Swiss High Dividend I dy CHF	15.00%
2. Robeco Sustainable Property Equities C EUR	10.00%
3. Swiss Life Funds (Lux) - Equity Global High Dividend EUR I Cap	9.00%
4. Swiss Life Funds (CH) Bond Swiss Francs A2	7.00%
5. Swiss Life Index Funds III (CH) Real Estate Switzerland I Cap	7.00%
6. Swiss Life Funds (LUX) Equity USA USD I Cap	6.00%
7. JPM US Select Equity C (dist) - USD	6.00%
8. Swiss Life Funds (LUX) Equity Europe High Dividend (EUR) I Dis	5.00%
9. Aegon Global Equity Income Fund S EUR Inc	4.00%
10. Swiss Life iFunds (CH) Bond Global Corporates (CHF hedged) I-A2	4.00%
11. M&G (Lux) Global Dividend Fund - EUR C Dist	4.00%
12. Mirabaud - Sustainable Global Strategic Bond Fund IH cap. CHF	4.00%
13. BlueBay Global High Yield Bond Fund Q CHF	3.00%
14. Swiss Life Funds (LUX) - Bond Emerging Markets Corporates IG CHF Hedged I Cap	2.00%
15. JPM Emerging Markets Dividend I Acc USD	1.00%

Source: fund management company

As at 21 May 2026

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