

Swiss Life Premium Comfort Prime Portfolio Equity

Investment strategy

The portfolio offers investors a global diversified investment generating high investment returns, which have a stabilising effect and contribute to the global performance. The portfolio aims to generate long-term capital growth by investing exclusively in high-risk funds. For this purpose we offer a globally diversified portfolio, with an equity fund quota of 100%. 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 large fluctuations in value and bears a high risk investment. The portfolio is suitable for investors who:

- can accept high price fluctuations
- are interested in high capital growth
- want high equity exposure
- want to remain committed on a long-term basis

Performance (in CHF)



	2021	2022	2023	2024	2025
Performance p. a.	11.37%	-11.91%	1.52%	14.73%	7.90%

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.	-	11.76%	8.22%	3.47%	4.73%	4.78%
Cumulative performance	5.18%	11.76%	26.77%	18.62%	58.82%	83.96%
Volatility	10.16%	8.40%	10.26%	10.41%	11.58%	12.18%

Source: fund management company

As at 21 May 2026

Fund management company: Swiss Life Asset Management AG

Inception date: 30 April 2013

Ongoing charges under PRIIP KID: 0.68%

Source: fund management company

As at 21 May 2026

Composition of the portfolio

1. Pictet CH - Swiss High Dividend I dy CHF	23.00%
2. Vontobel (CH) Sustainable Swiss Dividend AN CHF	18.00%
3. Swiss Life Funds (Lux) - Equity Global High Dividend EUR I Cap	15.00%
4. Swiss Life Funds (LUX) Equity USA USD I Cap	10.00%
5. JPM US Select Equity C (dist) - USD	10.00%
6. Swiss Life Funds (LUX) Equity Europe High Dividend (EUR) I Dis	9.00%
7. Aegon Global Equity Income Fund S EUR Inc	7.00%
8. M&G (Lux) Global Dividend Fund - EUR C Dist	7.00%
9. JPM Emerging Markets Dividend I Acc USD	1.00%

Source: fund management company

As at 21 May 2026

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