

As at 27 March 2025

Swiss Life Champion Portfolio Balanced

Investment strategy

The objective of the fund portfolio is to achieve medium to long term capital growth. Thus the fund portfolio invests in a balanced and globally diversified portfolio of equity and bond funds.

Investment suitability

The fund portfolio is suitable for investors who prefer a balanced portfolio and are prepared to accept a slighter higher risk in anticipation of higher returns.

Fund management company	Swiss Life Asset Management Ltd.
Inception date	31 January 2018
Ongoing charges under PRIIP KID	0.40%

Source: fund management company

As at 27 March 2025

Performance (in CHF)



	2020	2021	2022	2023	2024
Performance p. a.	3.58%	0.19%	-13.08%	2.55%	-1.47%

Source: fund management company

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Portfolio performance

	YTD	1 year	3 years	5 years	10 years	since inception
Performance p. a.	-	-0.39%	-2.06%	-1.41%	-	-0.57%
Cumulative performance	0.71%	-0.39%	-6.06%	-6.87%	-	-3.97%
Volatility	3.91%	3.85%	4.68%	4.09%	-	3.82%

Source: fund management company

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Composition of the portfolio

1.	Swiss Life Funds (CH) - iDynamic Light (CHF hedged) A2	50.00%
2.	Swiss Life iFunds (CH) Bond Global Government + (CHF hedged) I-A3	40.00%
3.	Swiss Life Index Funds (CH) Equity Switzerland Large Cap CHF I	10.00%

Source: fund management company

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