

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 | 0.41% |
| Source: fund management company | As at 8 June 2026 |

Performance (in CHF)



| | 2021 | 2022 | 2023 | 2024 | 2025 |
|-------------------|-------|---------|-------|--------|-------|
| Performance p. a. | 0.19% | -13.08% | 2.55% | -1.47% | 1.97% |

Source: fund management company

As at 8 June 2026

Portfolio performance

| | YTD | 1 year | 3 years | 5 years | 10 years | since inception |
|------------------------|--------|--------|---------|---------|----------|-----------------|
| Performance p. a. | - | 1.17% | 0.53% | -2.09% | - | -0.36% |
| Cumulative performance | -0.22% | 1.17% | 1.59% | -10.01% | - | -2.99% |
| Volatility | 5.62% | 4.36% | 4.36% | 4.48% | - | 3.95% |

Source: fund management company

As at 8 June 2026

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 I Cap | 10.00% |

Source: fund management company

As at 8 June 2026