

As at 23 April 2025

Swiss Life Preference Global Balanced

Investment strategy

The thematic portfolio investment contains actively managed investment funds investing in various regions and investment categories worldwide. The core investment consists of strategy funds. The portfolio offers an attractive risk-return ratio thanks to its broad base.

Investment suitability

This portfolio's investment strategy tolerates moderate fluctuations in assets and exposes the customer to medium risk. The portfolio is suitable for investors who:

- can accept moderate value fluctuations
- are interested in regular income as well as moderate capital growth

Performance (in CHF)



| | 2020 | 2021 | 2022 | 2023 | 2024 |
|-------------------|-------|-------|---------|-------|-------|
| Performance p. a. | 2.76% | 8.96% | -13.25% | 5.15% | 8.13% |

Source: fund management company

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Portfolio performance

| | YTD | 1 year | 3 years | 5 years | 10 years | since inception |
|------------------------|--------|--------|---------|---------|----------|-----------------|
| Performance p. a. | - | 2.39% | 0.59% | 3.19% | - | 1.88% |
| Cumulative performance | -2.29% | 2.39% | 1.78% | 17.01% | - | 14.15% |
| Volatility | 8.22% | 6.49% | 6.44% | 6.55% | - | 6.79% |

Source: fund management company

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Composition of the portfolio

| | | |
|---|--|--------|
| 1. Swiss Life Funds (F) Equity ESG Euro Zone Minimum Volatility (EUR) I Cap | | 12.50% |
| 2. UBS (CH) Property Fund - Swiss Mixed «Sima» | | 12.50% |
| 3. Swiss Life Funds (CH) - Portfolio Global Balanced (CHF) F Cap | | 12.50% |
| 4. Swisscanto (CH) Portfolio Fund Responsible World 45 DT CHF | | 12.50% |
| 5. UBS (CH) Suisse - 45 (CHF) Q-dist | | 12.50% |
| 6. Flossbach von Storch - Bond Opportunities - CHF-IT | | 12.50% |
| 7. Swiss Life Funds (LUX) - Equity ESG Global Protect CHF hedged I Cap | | 12.50% |
| 8. Swiss Life Flex Funds (CH) - Dynamic Allocation (CHF) I | | 12.50% |

Source: fund management company

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