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.

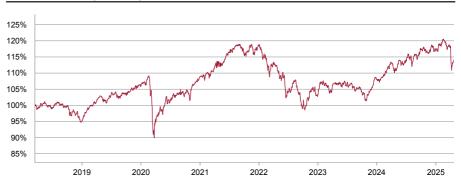
Investment suitability

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

Fund management company	Swiss Life Asset Management AG		
Inception date	15 March 2018		
Ongoing charges under PRIIP KID	0.76%		
Source: fund manage-	As at 23 April 2025		

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

As at 23 April 2025

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

As at 23 April 2025

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

As at 23 April 2025

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