

As at 23 April 2025

## Swiss Life Preference Global Equity

### Investment strategy

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

### Investment suitability

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

- can accept high value fluctuations
- are interested in value enhancement primarily through capital growth
- want to remain committed on a long-term basis

### Performance (in CHF)



	2020	2021	2022	2023	2024
Performance p. a.	-0.64%	17.68%	-13.82%	4.13%	12.15%

Source: fund management company

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### Portfolio performance

	YTD	1 year	3 years	5 years	10 years	since inception
Performance p. a.	-	-0.90%	0.43%	6.94%	-	2.47%
Cumulative performance	-4.49%	-0.90%	1.29%	39.90%	-	18.92%
Volatility	16.85%	12.89%	10.96%	11.04%	-	11.87%

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.	abrdn SICAV I - Global Sustainable Equity Fund X Acc CHF		12.50%
3.	White Fleet II - SGVP Global Value Equity Fund UBH CHF Cap		12.50%
4.	Invesco Developed Small and Mid-Cap Equity Fund - Z USD acc		12.50%
5.	Pictet (CH) - Swiss Equities-I CHF		12.50%
6.	DWS Top Dividende TFC		12.50%
7.	M&G (Lux) Global Emerging Markets Fund EUR C Accumulation		12.50%
8.	Swiss Life Funds (LUX) - Equity ESG Global Protect CHF hedged I Cap		12.50%

Source: fund management company

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