

As at 23 April 2025

Swiss Life Preference Dividend Growth

Investment strategy

The thematic portfolio investment contains actively managed investment funds that invest in securities with high dividends and distributions. Securities with high distributions are very sought after in the low interest environment as they combine stability with earnings opportunities. The core investment consists of strategy funds.

Investment suitability

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

- can accept elevated fluctuations in value
- are interested in value enhancement primarily through capital growth

Performance (in CHF)



	2020	2021	2022	2023	2024
Performance p. a.	-1.57%	10.75%	-9.87%	3.65%	10.34%

Source: fund management company

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Portfolio performance

	YTD	1 year	3 years	5 years	10 years	since inception
Performance p. a.	-	2.21%	0.88%	5.34%	-	2.63%
Cumulative performance	-1.60%	2.21%	2.65%	29.72%	-	20.29%
Volatility	13.97%	10.04%	8.69%	8.60%	-	9.33%

Source: fund management company

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Composition of the portfolio

1.	Swisscanto (CH) Portfolio Fund Responsible Valca BA CHF	12.50%
2.	M&G (Lux) IF 1 - Dynamic Allocation Fund CHF C-H Acc	12.50%
3.	BlueBay Global High Yield Bond Fund Q CHF	12.50%
4.	UBS (CH) Suisse - 65 (CHF) Q-dist	12.50%
5.	M&G (Lux) Global Dividend Fund - EUR C Acc	12.50%
6.	Swiss Life Funds (LUX) - Portfolio Global Growth CHF F Cap	12.50%
7.	DWS Top Dividende TFC	12.50%
8.	Swiss Life Funds (LUX) Equity Europe High Dividend (EUR) I Dis	12.50%

Source: fund management company

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