

As at 15 July 2025

Swiss Life Preference Swiss Life Income

Investment strategy

The portfolio's thematic investment contains actively managed investment funds launched or managed by Swiss Life Group companies (Swiss Life Holding Ltd or a company controlled by it). Use the longstanding asset management experience of Swiss Life Asset Managers. The core investment consists of strategy funds.

Investment suitability

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

- want to minimise value fluctuations
- are interested in regular earnings

Performance (in CHF)



	2020	2021	2022	2023	2024
Performance p. a.	4.05%	4.55%	-14.51%	4.02%	5.62%

Source: fund management company

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Portfolio performance

	YTD	1 year	3 years	5 years	10 years	since inception
Performance p. a.	-	2.47%	2.15%	0.79%	-	1.12%
Cumulative performance	0.74%	2.47%	6.59%	4.03%	-	8.55%
Volatility	4.25%	4.06%	4.06%	4.08%	-	4.30%

Source: fund management company

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Composition of the portfolio

1.	Swiss Life Funds (CH) - Portfolio Global Income (CHF) F Cap	12.50%
2.	Swiss Life Funds (LUX) - Equity ESG Global Protect CHF hedged I Cap	12.50%
3.	Swiss Life Flex Funds (CH) - Dynamic Allocation (CHF) I	12.50%
4.	Swiss Life Index Funds III (CH) Real Estate Switzerland I Cap	12.50%
5.	Swiss Life Funds (LUX) Bond Euro Corporates (CHF) Hedged I Cap	12.50%
6.	Pictet CH - LPP 25 - I dy CHF	12.50%
7.	Swiss Life iFunds (CH) Bond Global Corporates (CHF hedged) I-A2	12.50%
8.	UBS (CH) Suisse - 25 (CHF) Q-dist	12.50%

Source: fund management company

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