# 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:

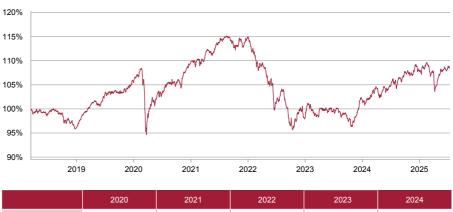
- · want to minimise value fluctuations
- · are interested in regular earnings

Fund management company	Swiss Life Asset Management AG
Inception date	15 March 2018
Ongoing charges under PRIIP KID	0.67%

Source: fund manage-

As at 15 July 2025

# 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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