

As at 11 September 2025

Swiss Life Preference Swiss Life Balanced

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 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

Performance (in CHF)



	2020	2021	2022	2023	2024
Performance p. a.	3.44%	7.97%	-14.05%	3.87%	7.99%

Source: fund management company

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Portfolio performance

	YTD	1 year	3 years	5 years	10 years	since inception
Performance p. a.	-	5.69%	4.74%	2.50%	-	2.43%
Cumulative performance	4.15%	5.69%	14.91%	13.17%	-	19.71%
Volatility	6.12%	5.74%	5.65%	5.80%	-	6.16%

Source: fund management company

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Composition of the portfolio

1. Swiss Life Funds (LUX) - Equity ESG Global Protect CHF hedged I Cap	12.50%
2. Swiss Life iFunds (CH) Bond Global Corporates (CHF hedged) I-A2	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. Swisscanto (CH) Portfolio Fund Responsible World 45 DT CHF	12.50%
6. Swiss Life Funds (CH) - Portfolio Global Balanced (CHF) F Cap	12.50%
7. Swiss Life Funds (F) Equity ESG Europe Minimum Volatility I Cap	12.50%
8. UBS (CH) Suisse - 45 (CHF) Q-dist	12.50%

Source: fund management company

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