

As at 30 October 2025

Swiss Life Preference Swiss Life Growth

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 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.	1.69%	13.83%	-13.07%	4.27%	11.40%

Source: fund management company

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Portfolio performance

	YTD	1 year	3 years	5 years	10 years	since inception
Performance p. a.	-	7.51%	7.54%	5.88%	-	4.05%
Cumulative performance	7.28%	7.51%	24.38%	33.10%	-	35.44%
Volatility	8.06%	7.77%	6.95%	7.41%	-	8.29%

Source: fund management company

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Composition of the portfolio

1.	Swiss Life Funds (LUX) Equity USA USD I Cap	12.50%
2.	Swisscanto (CH) Portfolio Fund Responsible Valca BA CHF	12.50%
3.	UBS (CH) Suisse - 65 (CHF) Q-dist	12.50%
4.	Swiss Life Funds (LUX) - Portfolio Global Growth CHF F Cap	12.50%
5.	Swiss Life Funds (F) Equity ESG Europe Minimum Volatility I Cap	12.50%
6.	M&G (Lux) IF 1 - Dynamic Allocation Fund CHF C-H Acc	12.50%
7.	Swiss Life Funds (LUX) - Equity Global Protect CHF hedged I Cap	12.50%
8.	Swiss Life Funds (LUX) - Bond Emerging Markets Corporates IG CHF Hedged I Cap	12.50%

Source: fund management company

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