

As at 23 April 2025

Swiss Life Preference Swiss Life Equity

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 equity funds.

Investment suitability

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

- can accept high value fluctuations
- are interested in value enhancement primarily through capital growth
- want to remain committed on a long-term basis

Performance (in CHF)



	2020	2021	2022	2023	2024
Performance p. a.	-3.37%	21.10%	-11.78%	4.16%	14.80%

Source: fund management company

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Portfolio performance

	YTD	1 year	3 years	5 years	10 years	since inception
Performance p. a.	-	1.58%	1.91%	7.28%	-	3.73%
Cumulative performance	-3.21%	1.58%	5.84%	42.09%	-	29.73%
Volatility	14.45%	11.12%	10.25%	10.48%	-	11.80%

Source: fund management company

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Composition of the portfolio

1.	Swiss Life Funds (F) Equity ESG Europe Minimum Volatility I Cap	12.50%
2.	Swiss Life Funds (LUX) Equity ESG Euro Zone I Cap.	12.50%
3.	White Fleet II - SGVP Global Value Equity Fund UBH CHF Cap	12.50%
4.	Swiss Life Funds (LUX) - Equity ESG Global Protect CHF hedged I Cap	12.50%
5.	DWS Top Dividende TFC	12.50%
6.	Swiss Life Funds (Lux) - Equity ESG Global High Dividend EUR I Cap	12.50%
7.	Pictet (CH) - Swiss Equities-I CHF	12.50%
8.	Swiss Life Funds (LUX) Equity ESG USA USD I Cap	12.50%

Source: fund management company

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