# 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

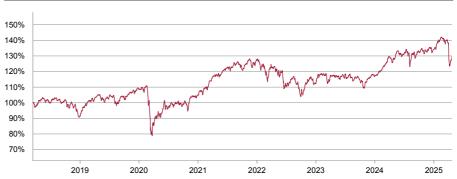
This portfolio's investment strategy tolerates high fluctuations in assets and exposes the customer to high risk. The portfolio is suitable for investors who:

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

Fund management company	Swiss Life Asset Management AG
Inception date	15 March 2018
Ongoing charges under PRIIP KID	0.79%

Source: fund management company As at 23 April 2025

## Performance (in CHF)



		2020	2021	2022	2023	2024
Per	rformance 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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