

As at 30 October 2025

Swiss Life Preference Trends Balanced

Investment strategy

The thematic portfolio investment contains actively managed investment funds that focus on significant trends (megatrends) and actively manage them. Megatrends represent trend-setting changes and offer long-term investment opportunities. 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.	5.94%	8.53%	-16.25%	4.76%	7.62%

Source: fund management company

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Portfolio performance

	YTD	1 year	3 years	5 years	10 years	since inception
Performance p. a.	-	3.01%	4.51%	2.60%	-	2.45%
Cumulative performance	2.44%	3.01%	14.15%	13.68%	-	20.34%
Volatility	7.64%	7.35%	6.53%	7.15%	-	7.73%

Source: fund management company

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Composition of the portfolio

1. Swiss Life Funds (CH) - Portfolio Global Balanced (CHF) F Cap	12.50%
2. Swisscanto (CH) Portfolio Fund Responsible World 45 DT CHF	12.50%
3. Swiss Life Flex Funds (CH) - Dynamic Allocation (CHF) I	12.50%
4. UBS (CH) Suisse - 45 (CHF) Q-dist	12.50%
5. Fidelity Funds - Global Demographics Fund Y-ACC-USD	12.50%
6. Mirabaud - Sustainable Global Strategic Bond Fund IH cap. CHF	12.50%
7. Pictet - Global Megatrend Selection I CHF	12.50%
8. Swiss Life REF (CH) ESG Swiss Properties	12.50%

Source: fund management company

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