

As at 15 July 2025

Swiss Life Preference Trends Growth

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 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.	6.86%	12.75%	-16.96%	7.28%	10.11%

Source: fund management company

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Portfolio performance

	YTD	1 year	3 years	5 years	10 years	since inception
Performance p. a.	-	-0.08%	5.09%	3.82%	-	3.87%
Cumulative performance	0.22%	-0.08%	16.07%	20.64%	-	32.18%
Volatility	12.34%	11.19%	9.06%	9.37%	-	10.39%

Source: fund management company

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Composition of the portfolio

1. Swisscanto (CH) Portfolio Fund Responsible Valca BA CHF	12.50%
2. UBS (CH) Suisse - 65 (CHF) Q-dist	12.50%
3. M&G (Lux) IF 1 - Dynamic Allocation Fund CHF C-H Acc	12.50%
4. Swiss Life Funds (LUX) - Portfolio Global Growth CHF F Cap	12.50%
5. Pictet - Global Megatrend Selection I CHF	12.50%
6. Pictet-Global Emerging Debt HI CHF	12.50%
7. Fidelity Funds - Global Demographics Fund Y-ACC-USD	12.50%
8. UBS (Lux) Security Equity Fund EB USD	12.50%

Source: fund management company

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