As at 30 October 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

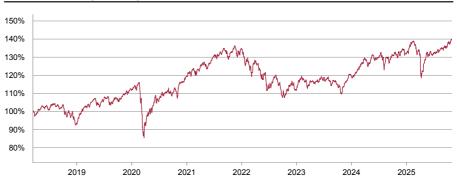
This portfolio's investment strategy tolerates increased fluctuations in assets and exposes the customer to increased risk. The portfolio is suitable for investors who:

- · can accept elevated fluctuations in value
- are interested in value enhancement primarily through capital growth

Fund management company	Swiss Life Asset Management AG
Inception date	15 March 2018
Ongoing charges under PRIIP KID	1.00%

Source: fund manage- As at 30 October 2025

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.	-	6.55%	7.60%	5.40%	-	4.47%
Cumulative performance	5.84%	6.55%	24.59%	30.08%	-	39.60%
Volatility	10.49%	10.11%	8.67%	9.21%	-	10.26%

Source: fund management company

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Composition of the portfolio

1.	UBS (Lux) Security Equity Fund I-A1-acc	1:	2.50%
2.	Fidelity Funds - Global Demographics Fund Y-ACC-USD	12	2.50%
3.	M&G (Lux) IF 1 - Dynamic Allocation Fund CHF C-H Acc	1:	2.50%
4.	William Blair Emerging Markets Debt Hard Currency Fund SH CHF	1:	2.50%
5.	Pictet - Global Megatrend Selection I CHF	12	2.50%
6.	Swisscanto (CH) Portfolio Fund Responsible Valca BA CHF	1:	2.50%
7.	Swiss Life Funds (LUX) - Portfolio Global Growth CHF F Cap	12	2.50%
8.	UBS (CH) Suisse - 65 (CHF) Q-dist	1:	2.50%

Source: fund management company

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