

As at 15 July 2025

Swiss Life Preference Trends Equity

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 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.	8.14%	17.25%	-18.22%	8.32%	13.34%

Source: fund management company

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Portfolio performance

	YTD	1 year	3 years	5 years	10 years	since inception
Performance p. a.	-	-0.74%	6.42%	5.43%	-	5.23%
Cumulative performance	-0.32%	-0.74%	20.56%	30.27%	-	45.40%
Volatility	14.11%	13.05%	10.88%	11.35%	-	12.70%

Source: fund management company

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Composition of the portfolio

1.	White Fleet II - SGVP Global Value Equity Fund UBH CHF Cap	12.50%
2.	UBS (Lux) Security Equity Fund EB USD	12.50%
3.	DWS Top Dividende TFC	12.50%
4.	Fidelity Funds - Global Demographics Fund Y-ACC-USD	12.50%
5.	Pictet (CH) - Swiss Equities-I CHF	12.50%
6.	Pictet - Global Megatrend Selection I CHF	12.50%
7.	Robeco Global Consumer Trends Equities I USD	12.50%
8.	Swiss Life Funds (LUX) - Equity ESG Global Protect CHF hedged I Cap	12.50%

Source: fund management company

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