

As at 30 October 2025

Swiss Life Preference Sustainability Balanced

Investment strategy

The thematic portfolio investment contains actively managed investment funds that invest in accordance with specific sustainability criteria, such as environmental protection, social responsibility and governance (so-called ESG criteria). 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%	11.17%	-15.30%	5.42%	8.70%

Source: fund management company

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Portfolio performance

	YTD	1 year	3 years	5 years	10 years	since inception
Performance p. a.	-	4.30%	5.17%	3.82%	-	3.45%
Cumulative performance	3.36%	4.30%	16.34%	20.63%	-	29.54%
Volatility	7.04%	6.88%	6.44%	7.15%	-	7.83%

Source: fund management company

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Composition of the portfolio

1.	Schroder ISF Global Sustainable Growth EUR C Acc	12.50%
2.	Swiss Life Funds (CH) - Portfolio Global Balanced (CHF) F Cap	12.50%
3.	Swisscanto (CH) Portfolio Fund Responsible World 45 DT CHF	12.50%
4.	Swiss Life Flex Funds (CH) - Dynamic Allocation (CHF) I	12.50%
5.	UBS (CH) Suisse - 45 (CHF) Q-dist	12.50%
6.	UBS (Lux) Equity Fund - Global Sustainable (USD) I-A2-acc	12.50%
7.	Vontobel Fund (CH) - Sustainable Bond CHF Concept IA	12.50%
8.	SF Sustainable Property Fund CH	12.50%

Source: fund management company

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Fund management company	Swiss Life Asset Management AG
Inception date	15 March 2018
Ongoing charges under PRIIP KID	0.75%

Source: fund management company

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