# **Swiss Life Preference Sustainability Equity**

### 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 equity funds.

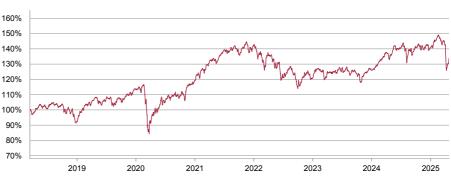
### Investment suitability

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

Fund management company	Swiss Life Asset Management AG
Inception date	15 March 2018
Ongoing charges under PRIIP KID	0.82%
Source: fund manage- ment company	As at 24 April 2025

## Performance (in CHF)



	2020	2021	2022	2023	2024
Performance p. a.	5.55%	18.77%	-14.95%	4.43%	11.64%

Source: fund management company

As at 24 April 2025

#### Portfolio performance

	YTD	1 year	3 years	5 years	10 years	since inception
Performance p. a.	-	-1.53%	-0.14%	6.38%	-	4.18%
Cumulative performance	-4.84%	-1.53%	-0.42%	36.28%	-	33.84%
Volatility	17.52%	12.46%	10.31%	10.22%	-	11.40%

Source: fund management company

As at 24 April 2025

### Composition of the portfolio

1.	Candriam Sustainable - Equity Emerging Markets - C Part (I)	12.50%
2.	White Fleet II - SGVP Global Value Equity Fund UBH CHF Cap	12.50%
3.	DWS Top Dividende TFC	12.50%
4.	Goldman Sachs Global Sustainable Equity I Cap	12.50%
5.	Pictet (CH) - Swiss Equities-I CHF	12.50%
6.	Pictet CH Quest - Swiss Sustainable Equities - I dy	12.50%
7.	Swiss Life Funds (LUX) - Equity ESG Global Protect CHF hedged I Cap	12.50%
8.	UBS (Lux) Equity Fund - Global Sustainable (USD) I-A2-acc	12.50%

Source: fund management company

As at 24 April 2025

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