

As at 24 April 2025

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

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

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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

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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

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