

Multimanager-Strategies zweiplus® (Balanced - CHF)

Aquila Asset Management Ltd

Investment Objective

The actively managed Multimanager-Strategy zweiplus® (CHF - Balanced) is suitable for investors who want to generate growth in assets over the long term and are willing to accept fluctuations in value.

Investment Policy

The strategy invests between 25 % and 65 % in equity funds and bond funds, respectively. In addition, the assets can be invested up to 25 % in alternative investments and up to 30 % in money market funds. The foreign currency allocation can amount to maximum 50 %.

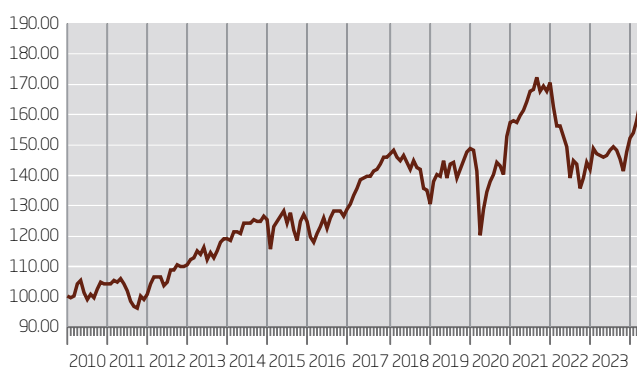
Investment Horizon

bank zweiplus recommends an investment horizon of minimum 7 years for investors.

Investment risk

This investment strategy accepts medium risk with an average fluctuation margin.

Performance



Performance as of 31/03/2024

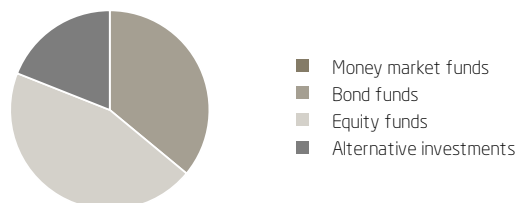
Year-to-date (YTD)		7.65 %
Since launch	15/12/2009	63.67 %

Performance per year

2023	7.45 %
2022	-16.84 %
2021	8.21 %
2020	5.63 %
2019	14.27 %

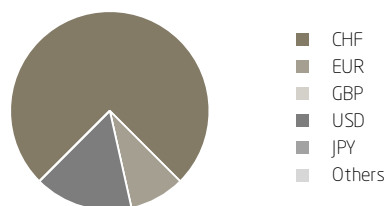
Diversification by investment

Money market funds	0.00 %
Bond funds	36.00 %
Equity funds	45.00 %
Alternative investments	19.00 %



Foreign currency portion

CHF	75.00 %
EUR	9.00 %
GBP	0.00 %
USD	16.00 %
JPY	0.00 %
Others	0.00 %



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