

Multimanager-Strategies zweiplus® (Conservative - EUR)

Aquila Asset Management Ltd

Investment Objective

The actively managed Multimanager-Strategy zweiplus® (EUR - Conservative) is suitable for investors who aim to preserve their assets through constant returns.

Investment Policy

The strategy invests between 5 % and 35 % in equity funds and up to 80 % in bond funds. In addition, the assets can be invested up to 25 % in alternative investments and/or in money market funds. The foreign currency allocation can amount to maximum 50 %.

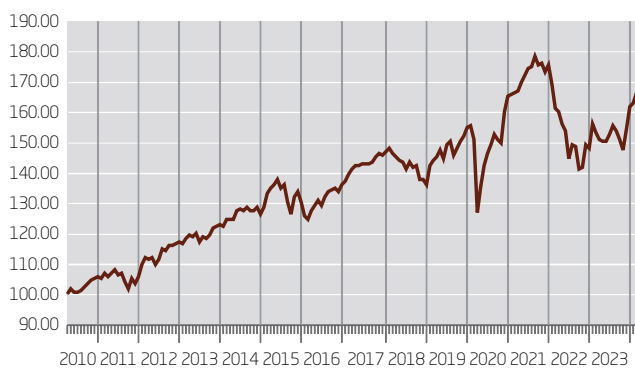
Investment Horizon

bank zweiplus recommends an investment horizon of minimum 5 years for investors.

Investment risk

This investment strategy accepts moderate risk with the smallest possible fluctuation margin.

Performance



Performance as of 31/03/2024

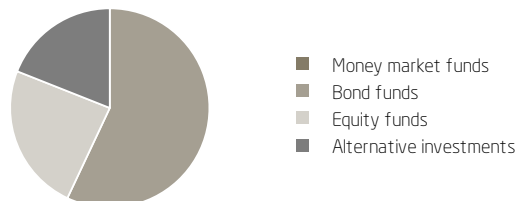
Year-to-date (YTD)		5.73 %
Since launch	19/03/2010	70.70 %

Performance per year

2023	8.91 %
2022	-15.45 %
2021	6.25 %
2020	6.73 %
2019	13.85 %

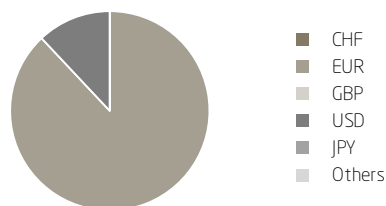
Diversification by investment

Money market funds	0.00 %
Bond funds	57.00 %
Equity funds	24.00 %
Alternative investments	19.00 %



Foreign currency portion

CHF	0.00 %
EUR	88.00 %
GBP	0.00 %
USD	12.00 %
JPY	0.00 %
Others	0.00 %



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