

Multimanager-Strategies zweiplus® (Conservative - CHF)

Bank J. Safra Sarasin Ltd

Investment Objective

The actively managed Multimanager-Strategy zweiplus® (CHF - 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 money market funds. The foreign currency allocation can amount to maximum 50 %.

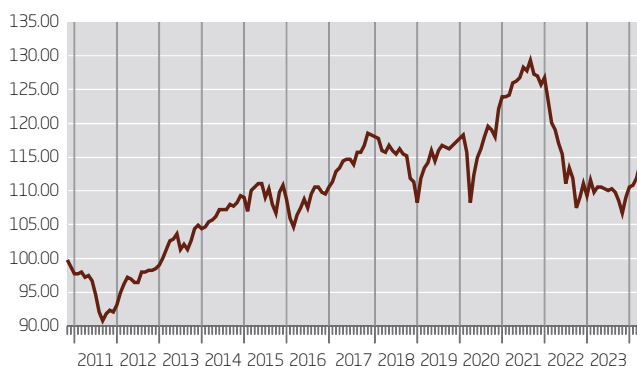
Investment Horizon

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

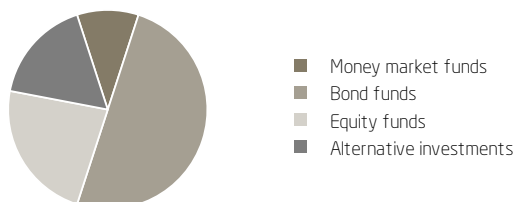
Year-to-date (YTD)		3.19 %
Since launch	15/10/2010	13.88 %

Performance per year

2023	1.12 %
2022	-13.82 %
2021	2.30 %
2020	5.12 %
2019	8.97 %

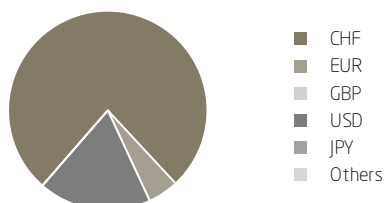
Diversification by investment

Money market funds	10.00 %
Bond funds	50.00 %
Equity funds	23.00 %
Alternative investments	17.00 %



Foreign currency portion

CHF	76.70 %
EUR	5.00 %
GBP	0.00 %
USD	18.30 %
JPY	0.00 %
Others	0.00 %



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