

Multimanager-Strategies zweiplus® (Balanced - CHF)

Bank J. Safra Sarasin 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 %.

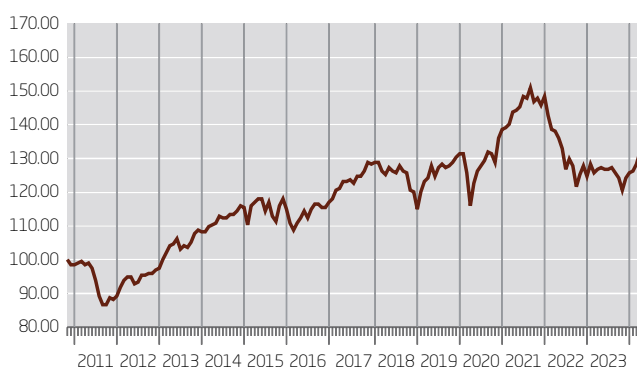
Investment Horizon

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

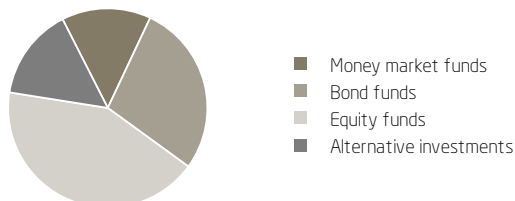
Year-to-date (YTD)		5.13 %
Since launch	15/10/2010	31.84 %

Performance per year

2023	0.65 %
2022	-15.95 %
2021	7.12 %
2020	5.57 %
2019	14.48 %

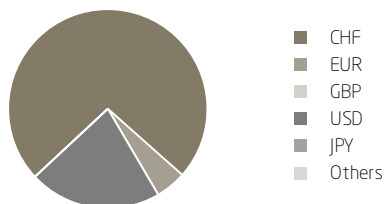
Diversification by investment

Money market funds	14.50 %
Bond funds	28.00 %
Equity funds	42.50 %
Alternative investments	15.00 %



Foreign currency portion

CHF	73.50 %
EUR	5.00 %
GBP	0.00 %
USD	21.50 %
JPY	0.00 %
Others	0.00 %



Disclaimer

This document contains advertising. This document is intended exclusively for persons resident in Switzerland. It is not intended for persons whose residence or nationality prevents them from accessing the kind of information contained in this document in accordance with applicable law. In particular, this document is not intended for US persons. If it relates to a financial instrument for which a prospectus and/or key investor information document are available, these can be obtained from bank zweiplus Ltd, Buckhauserstrasse 22, CH-8048 Zurich, or from the issuer of the financial instrument. We recommend that you obtain detailed information prior to making any investment decision. Investments should be carried out on the basis of the current sales prospectus. Performances realized in the past are no guarantee for future trends. The performance indicated does not take into account any commissions and costs incurred for subscription and redemption of fund units. Any distributions are reinvested.