

Multimanager-Strategies zweiplus® (Conservative - CHF)

Aquila Asset Management 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 %.

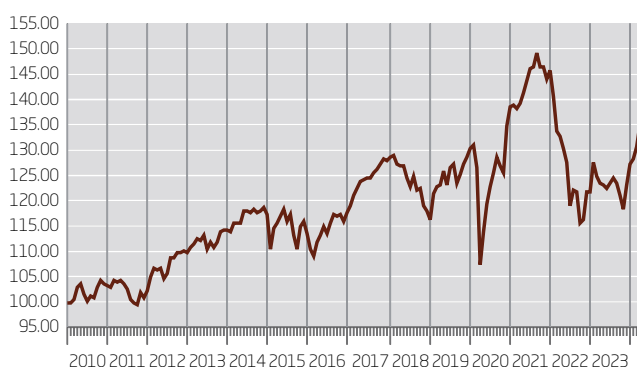
Investment Horizon

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

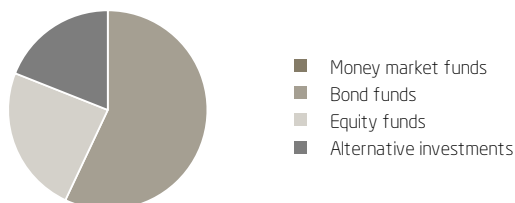
Year-to-date (YTD)		6.20 %
Since launch	15/12/2009	34.81 %

Performance per year

2023	4.50 %
2022	-16.60 %
2021	5.26 %
2020	6.22 %
2019	12.09 %

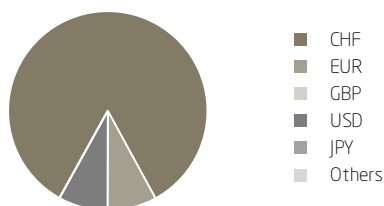
Diversification by investment

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



Foreign currency portion

CHF	84.00 %
EUR	8.00 %
GBP	0.00 %
USD	8.00 %
JPY	0.00 %
Others	0.00 %



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