

Multimanager-Strategien zweiplus® (Balanced - EUR)

Bank J. Safra Sarasin Ltd

Investment Objective

The actively managed Multimanager-Strategy zweiplus® (EUR - 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 %.

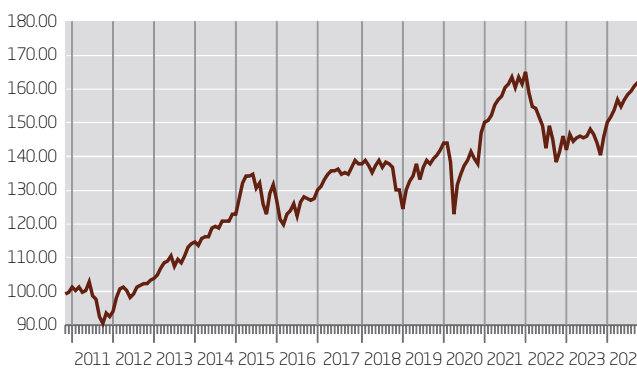
Investment Horizon

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 30/09/2024

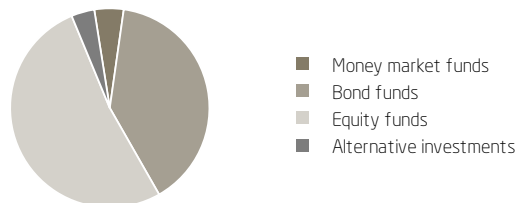
Year-to-date (YTD)		7.76 %
Since launch	15/10/2010	61.81 %

Performance per year

2023	5.91 %
2022	-13.92 %
2021	9.84 %
2020	4.38 %
2019	15.62 %

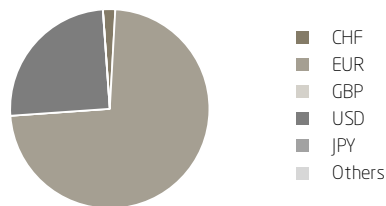
Diversification by investment

Money market funds	4.75 %
Bond funds	39.50 %
Equity funds	52.00 %
Alternative investments	3.75 %



Foreign currency portion

CHF	2.00 %
EUR	73.00 %
GBP	0.00 %
USD	25.00 %
JPY	0.00 %
Others	0.00 %



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