

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 %.

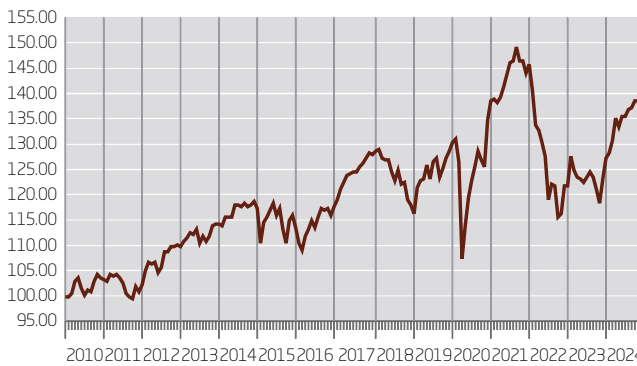
Investment Horizon

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 31/10/2024

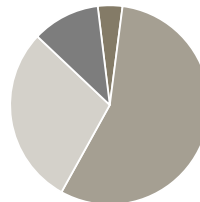
Year-to-date (YTD)		8.91 %
Since launch	15/12/2009	38.25 %

Performance per year

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

Diversification by investment

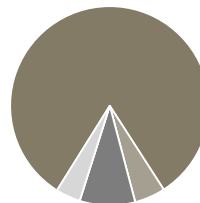
Money market funds	4.00 %
Bond funds	56.00 %
Equity funds	29.00 %
Alternative investments	11.00 %



- Money market funds
- Bond funds
- Equity funds
- Alternative investments

Foreign currency portion

CHF	82.00 %
EUR	5.00 %
GBP	0.00 %
USD	9.00 %
JPY	0.00 %
Others	4.00 %



- CHF
- EUR
- GBP
- USD
- JPY
- Others

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