

Multimanager-Strategies zweiplus® (Balanced - CHF)

Aquila Asset Management 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 %.

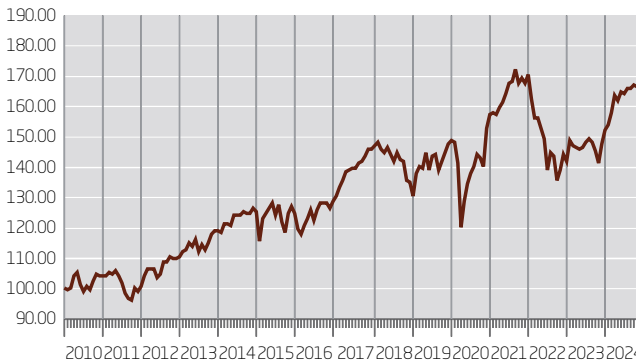
Investment Horizon

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 31/10/2024

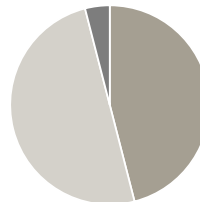
| | | |
|--------------------|------------|---------|
| Year-to-date (YTD) | | 9.48 % |
| Since launch | 15/12/2009 | 66.46 % |

Performance per year

| | |
|------|----------|
| 2023 | 7.45 % |
| 2022 | -16.84 % |
| 2021 | 8.21 % |
| 2020 | 5.63 % |
| 2019 | 14.27 % |

Diversification by investment

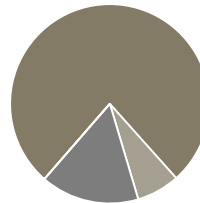
| | |
|-------------------------|---------|
| Money market funds | 0.00 % |
| Bond funds | 46.00 % |
| Equity funds | 50.00 % |
| Alternative investments | 4.00 % |



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

Foreign currency portion

| | |
|--------|---------|
| CHF | 77.00 % |
| EUR | 7.00 % |
| GBP | 0.00 % |
| USD | 16.00 % |
| JPY | 0.00 % |
| Others | 0.00 % |



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

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