

Multimanager-Strategies zweiplus® (Balanced - EUR)

Aquila Asset Management 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 %.

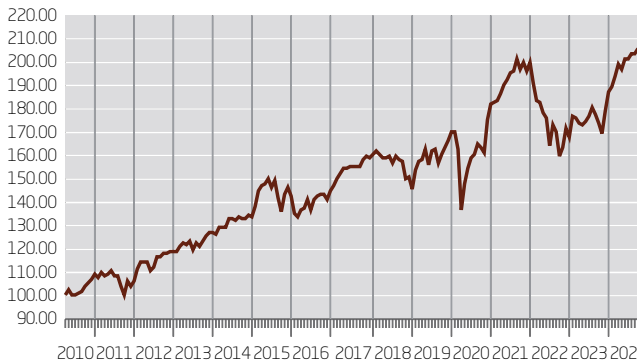
Investment Horizon

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

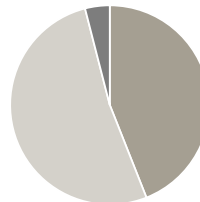
Year-to-date (YTD)		9.87 %
Since launch	19/03/2010	105.75 %

Performance per year

2023	11.70 %
2022	-15.93 %
2021	9.90 %
2020	6.99 %
2019	16.66 %

Diversification by investment

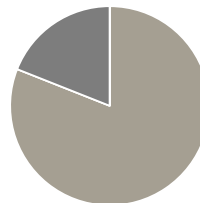
Money market funds	0.00 %
Bond funds	44.00 %
Equity funds	52.00 %
Alternative investments	4.00 %



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

Foreign currency portion

CHF	0.00 %
EUR	81.00 %
GBP	0.00 %
USD	19.00 %
JPY	0.00 %
Others	0.00 %



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

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