

Multimanager-Strategien zweiplus® (Balanced - CHF)

Bank J. Safra Sarasin 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

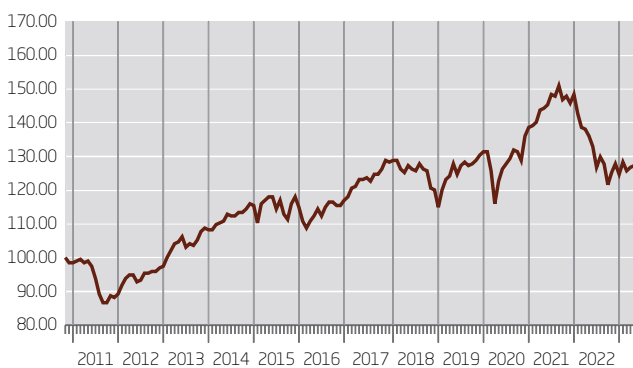
The strategy invests between 25 % and 65 % in equity funds and bond funds, respectively. In addition, the assets can be invested up to 25 % in alternative investments and up to 30 % in money market funds. The foreign currency allocation can amount to maximum 50 %.

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 31/05/2023**

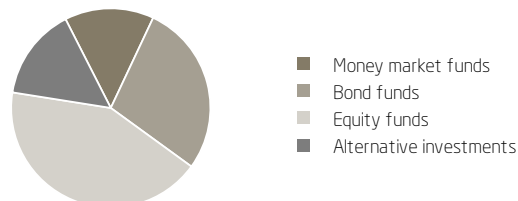
Year-to-date (YTD)		1.39 %
Since launch	15/10/2010	26.34 %

Performance per year

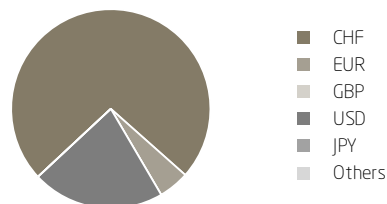
2022	-15.95 %
2021	7.12 %
2020	5.57 %
2019	14.48 %
2018	-10.86 %

Diversification by investment

Money market funds	14.50 %
Bond funds	28.00 %
Equity funds	42.50 %
Alternative investments	15.00 %

**Foreign currency portion**

CHF	73.50 %
EUR	5.00 %
GBP	0.00 %
USD	21.50 %
JPY	0.00 %
Others	0.00 %

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