

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 %.

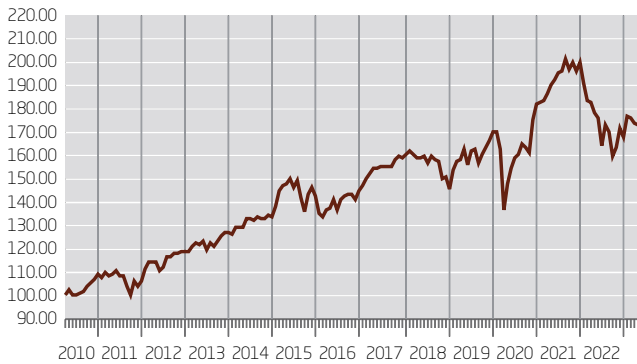
Investment Horizon

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 30/04/2023

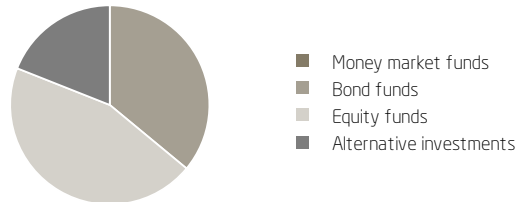
Year-to-date (YTD)		3.27 %
Since launch	19/03/2010	73.14 %

Performance per year

2022	-15.93 %
2021	9.90 %
2020	6.99 %
2019	16.66 %
2018	-9.14 %

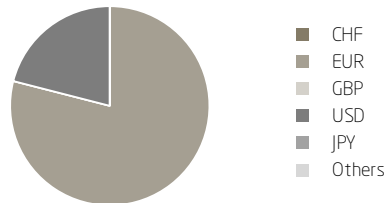
Diversification by investment

Money market funds	0.00 %
Bond funds	36.00 %
Equity funds	45.00 %
Alternative investments	19.00 %



Foreign currency portion

CHF	0.00 %
EUR	79.00 %
GBP	0.00 %
USD	21.00 %
JPY	0.00 %
Others	0.00 %



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