

Multimanager-Strategies zweiplus® (Growth - CHF)

Bank J. Safra Sarasin Ltd

Investment Objective

The actively managed Multimanager-Strategy zweiplus® (CHF - Growth) is suitable for investors who strive to generate substantial growth in assets over the long term and are willing to accept higher fluctuations in value.

Investment Policy

The strategy invests between 50 % and 90 % in equity funds and up to 10 % in bond funds. In addition, the assets can be invested up to 30 % in alternative investments and up to 40 % in money market funds. The foreign currency allocation can amount to maximum 50 %.

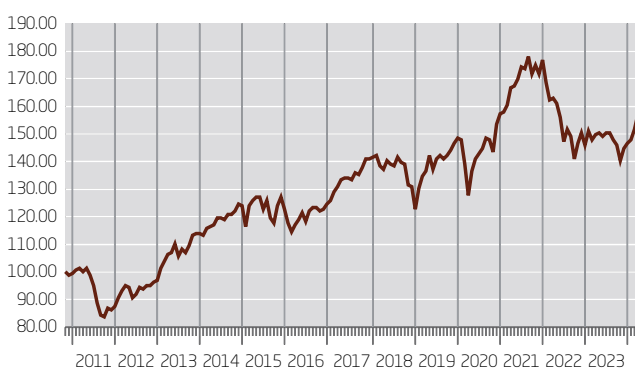
Investment Horizon

bank zweiplus recommends an investment horizon of minimum 10 years for investors.

Investment risk

This strategy is suitable for investors who would like substantial asset growth in the long term and are willing to accept stronger fluctuations in value.

Performance



Performance as of 31/03/2024

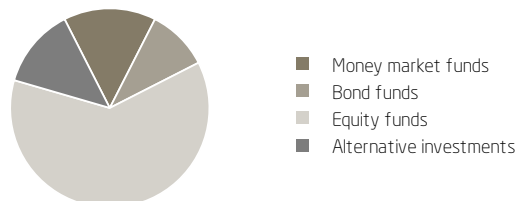
Year-to-date (YTD)		7.31 %
Since launch	15/10/2010	56.98 %

Performance per year

2023	0.32 %
2022	-17.44 %
2021	12.29 %
2020	6.35 %
2019	21.09 %

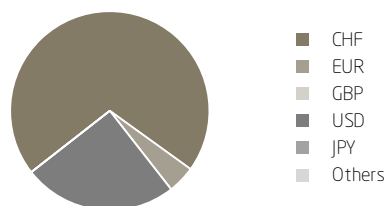
Diversification by investment

Money market funds	15.00 %
Bond funds	10.00 %
Equity funds	62.00 %
Alternative investments	13.00 %



Foreign currency portion

CHF	70.50 %
EUR	4.50 %
GBP	0.00 %
USD	25.00 %
JPY	0.00 %
Others	0.00 %



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