

Multimanager-Strategies zweiplus® (Conservative - EUR)

Bank J. Safra Sarasin Ltd

Investment Objective

The actively managed Multimanager-Strategy zweiplus® (EUR - Conservative) is suitable for investors who aim to preserve their assets through constant returns.

Investment Policy

The strategy invests between 5 % and 35 % in equity funds and up to 80 % in bond funds. In addition, the assets can be invested up to 25 % in alternative investments and/or in money market funds. The foreign currency allocation can amount to maximum 50 %.

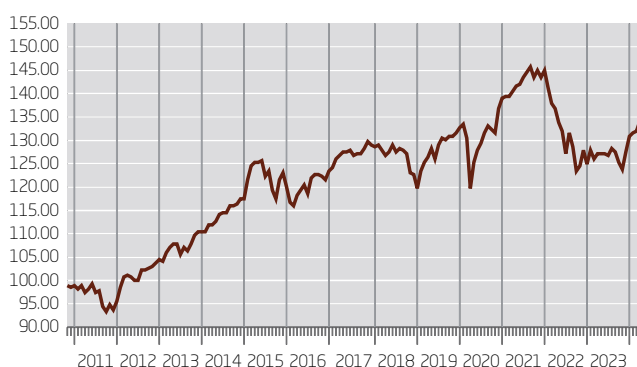
Investment Horizon

bank zweiplus recommends an investment horizon of minimum 5 years for investors.

Investment risk

This investment strategy accepts moderate risk with the smallest possible fluctuation margin.

Performance



Performance as of 31/03/2024

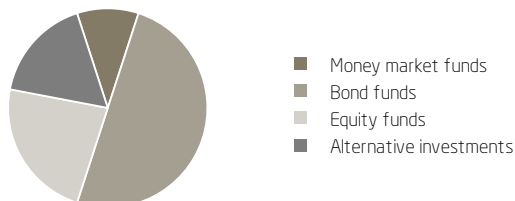
Year-to-date (YTD)		2.41 %
Since launch	15/10/2010	33.91 %

Performance per year

2023	4.74 %
2022	-13.81 %
2021	4.23 %
2020	4.89 %
2019	11.00 %

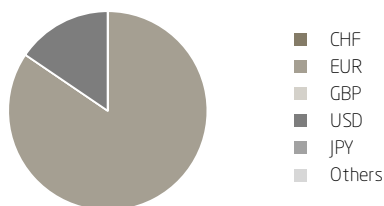
Diversification by investment

Money market funds	10.00 %
Bond funds	50.00 %
Equity funds	23.00 %
Alternative investments	17.00 %



Foreign currency portion

CHF	0.00 %
EUR	84.50 %
GBP	0.00 %
USD	15.50 %
JPY	0.00 %
Others	0.00 %



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