

Investment Profiles

Investment Profile

Your investment strategy
 Historical average return
 Your investment horizon

Select 45

Conservative
 2-5%
 4-5 years



Neutral

Liquidity	0-80%
Bonds	20-80%
Shares	10-45%
Alternative Investments and Commodities	0-15%

Liquidity	15%
Bonds	50%
Shares	27.50%
Alternative Investments and Commodities	7.50%

Equity shares up to max. 45%
 Foreign currency max. 65%

Investment Profile

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Balance 60

Balanced
 4-6%
 6-7 years



Neutral

Liquidity	0-80%
Bonds	15-60%
Shares	15-60%
Alternative Investments and Commodities	0-20%

Liquidity	15%
Bonds	37.50%
Shares	37.50%
Alternative Investments and Commodities	10%

Equity shares up to max. 60%
 Foreign currency max. 70%

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Ambition 75

Dynamic
 5-7%
 8-9 years



Neutral

Liquidity	0-80%
Bonds	10-40%
Shares	20-75%
Alternative Investments and Commodities	0-25%

Liquidity	15%
Bonds	25%
Shares	47.50%
Alternative Investments and Commodities	12.50%

Equity shares up to max. 75%
 Foreign currency max. 75%

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Focus 90

Focus stocks
6-9%
>10 years



Neutral

Liquidity	0-80%
Bonds	0-25%
Shares	25-90%
Alternative Investments and Commodities	0-30%

Liquidity	15%
Bonds	12.50%
Shares	57.50%
Alternative Investments and Commodities	15%

Equity shares up to max. 90%
Foreign currency max. 80%

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HEIDI*

Dividends
5-7%
8-9 years



Neutral

Liquidity	0-80%
Bonds	10-40%
Shares	20-90%
Alternative Investments and Commodities	0-10%

Liquidity	15%
Bonds	25%
Shares	55%
Alternative Investments and Commodities	5%

Equity shares up to max. 90%
Foreign currency max. 80%

*HEIDI High Expected Irresistible Dividend Investments

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Tailor-made

Your choice
Depending on the investment
Your choice



You define the specifications according to your ideas.

The investment strategy is tailor-made and individually tailored to you. We support you in making the right choice.