

Finpact

Offer Report

Allwetter-Portfolio Growth

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Risk Profile Growth	Management Approach Active	Minimum Portfolio Size CHF 50'000	Currency CHF
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Management Style

Allwetter-Portfolio für mehr Kontrolle

Aktiv gesteuerter Aktienanteil und breiter Diversifikation für unsichere Börsenzeiten, systematisch umgesetzt.

Risikoampel

Die Risikoampel misst das Stressniveau am Finanzmarkt und erlaubt es, den Pulsschlag der Wirtschaft systematisch zu überwachen. Eine grüne Ampel misst ein niedriges und eine rote ein hohes Stressniveau. Die Taktische Asset Allocation wird über die Risikoampel gesteuert, wobei der Aktienanteil je nach Stressniveau zwischen 5 und 75 Prozent liegt.

Anlagebausteine

Die Anlagebausteine werden mittels Best-in-Class-Ansatz ausgewählt mit dem Ziel, die Produktkosten im Portfolio zu minimieren.

<https://finpact.ch/allwetter-portfolio/>

Portfolio Composition

Das Portfolio wird als breit diversifiziertes Mult-Asset-Portfolio umgesetzt. Die Strategie kombiniert den Inflationsdämpfer, der den Kaufkraftverlust ausgleicht mit der Risikoampel, die länger anhaltende negative Aktienmarktrenditen abfedert.

*Performance Daten basierend auf Modellportfolio.

Custody

Hypothekbank Lenzburg

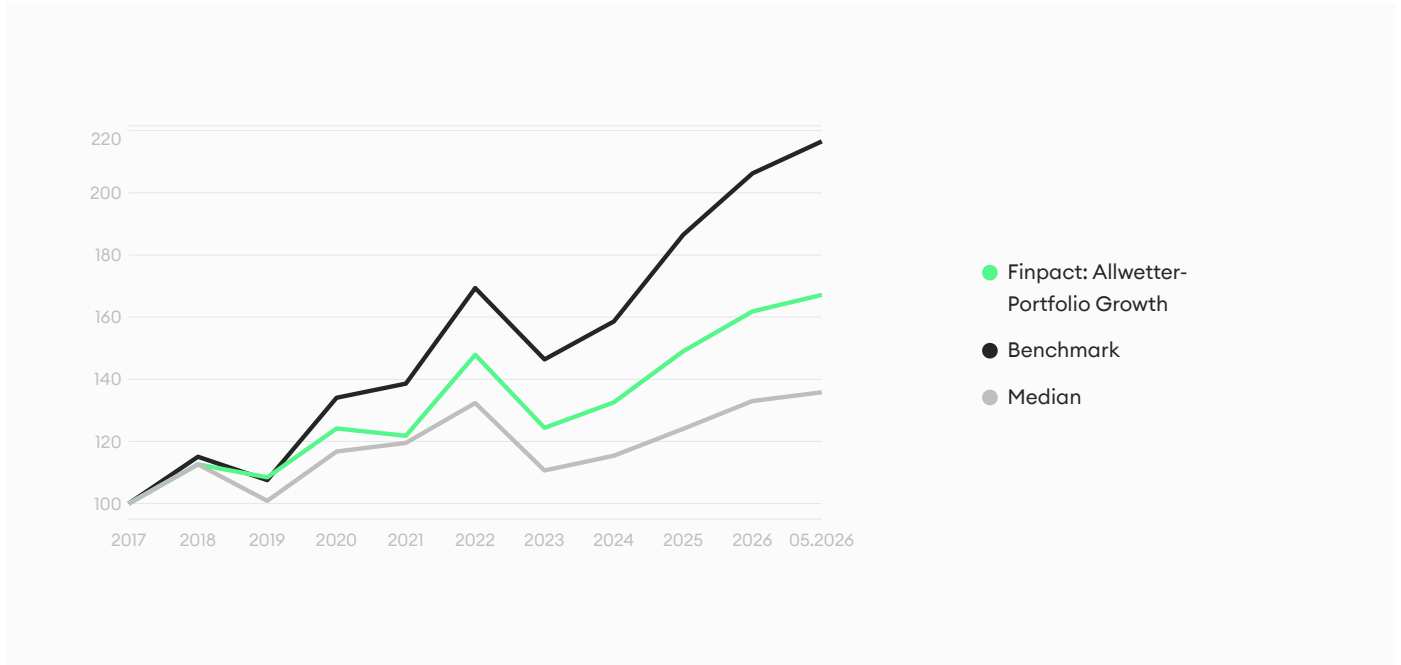
Asset Allocation

Allocation		Allocation		Allocation		Allocation	
Cash	2.0 %	Bonds	6.0 %	Equity	79.0 %	Alternatives	13.0 %
		High Grade	6.0 %	Global	42.0 %	Commodities	5.0 %
		High Yield	0.0 %	Europe	0.0 %	Gold	3.0 %
		Emerging Markets	0.0 %	Emerging Markets	0.0 %	Hedge Funds	0.0 %
		Convertibles	0.0 %	Pacific	0.0 %	Real Estate Global	0.0 %
				Switzerland	37.0 %	Real Estate Switzerland	5.0 %
				UK	0.0 %	Private Equity	0.0 %
				USA	0.0 %	Crypto	0.0 %

Track Record

Return: **67.2 %** Return p.a.: **5.7 %** Volatility: **10.8 %**

	2017	2018	2019	2020	2021	2022	2023	2024	2025	30.04.2026
Performance	N/A	-3.70 %	14.50 %	-1.90 %	21.40 %	-15.90 %	6.60 %	12.40 %	8.60 %	3.29 %



Costs

The cost rating is based on an assumption of a 2 million mandate in the chosen currency and includes possible discounts offered on the ZWEI Wealth platform. The information is considered an indication and would be negotiated with the provider in the event of an offer.

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