

OLZ  
**Offer**  
**Report**

**OLZ Equity Switzerland Small & Mid Cap  
Optimized ESG**

# OLZ Equity Switzerland Small & Mid Cap Optimized ESG

Risk Profile  
Equity

Management Approach  
Active

Minimum Portfolio Size  
CHF 150'000

Currency  
CHF

## Management Style

Mit modernsten wissenschaftlichen Modellen werden die Einzeltitel regelbasiert so ausgewählt und gewichtet, dass die Diversifikation erhöht und das Portfoliorisiko insgesamt minimiert wird. Dies führt zu tieferen Wertschwankungen und geringeren Verlusten in negativen Marktphasen. Die empirische Evidenz zeigt, dass der Fokus auf risikoarme Aktien langfristig eine höhere risikoadjustierte Rendite liefert. Die effiziente, kostenoptimierte Umsetzung erfolgt ohne diskretionären Spielraum seitens Portfoliomanagement. Neben der Reduktion des Anlagerisikos wird auch das Nachhaltigkeitsprofil des Portfolios adressiert und im Benchmarkvergleich verbessert.

## Portfolio Composition

Umsetzung erfolgt über eigenen Fonds:

1% Cash

99% Aktien Schweiz Small & Mid Caps

Anmerkung ZWEI Wealth: Die Performance dieser Lösung ist mehrheitlich ein Backtest aber Rule-based.

## Asset Allocation

Allocation		Allocation		Allocation		Allocation	
Cash	1.0 %	Bonds	0.0 %	Equity	99.0 %	Alternatives	0.0 %
		High Grade	0.0 %	Global	0.0 %	Commodities	0.0 %
		High Yield	0.0 %	Europe	0.0 %	Gold	0.0 %
		Emerging Markets	0.0 %	Emerging Markets	0.0 %	Hedge Funds	0.0 %
		Convertibles	0.0 %	Pacific	0.0 %	Real Estate Global	0.0 %
				Switzerland	99.0 %	Real Estate Switzerland	0.0 %
				UK	0.0 %	Private Equity	0.0 %
				USA	0.0 %	Crypto	0.0 %

# Track Record

Return: **132.6 %**    Return p.a.: **9.5 %**    Volatility: **13.9 %**

	2017	2018	2019	2020	2021	2022	2023	2024	2025	30.04.2026
<b>Performance</b>	20.67 %	-8.87 %	27.13 %	9.78 %	21.55 %	-16.71 %	9.05 %	8.05 %	20.17 %	5.74 %



## 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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