

Asset management mandate

Focus Switzerland Balanced CHF

Do you want your assets to grow in the long term, but without a dominating share of equities? Then this investment strategy is absolutely right for you.

Your investment goal and investment strategy

You are aiming for long-term asset growth through capital gains and regular income from interest and dividends. Your assets are largely invested in investments in Swiss francs. The weighting of the investment classes is determined by a panel of experienced asset management experts. Investment decisions are made on the basis of an intensive analysis of the financial markets. The analysis takes place through our own research and is broad based. This enables optimum investment decisions. From the over 8,500 funds authorised in Switzerland, the best are selected for you and constantly monitored according to the “best in class” approach using strict criteria.

Financial instruments

Balanced distribution between fixed-income investments and equities, supplemented with non-traditional investments (e.g. real estate, commodities, precious metals). The implementation takes place using cost-efficient collective capital investments (e.g. funds, ETFs). Variant with individual Swiss shares from 300,000 CHF (additional fee 0.1 % p.a.).

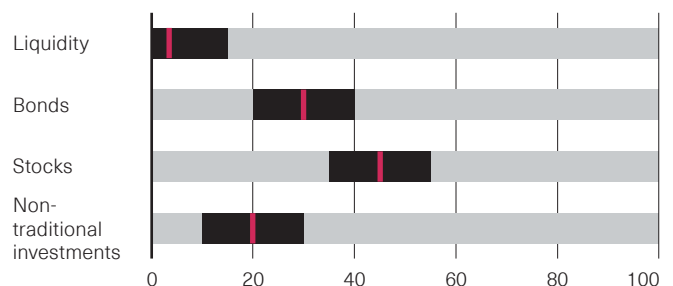
Main benefits

- Professional asset management from 100,000 CHF.
- The weighting of various investment classes is kept within set ranges to take account of the risk profile of the mandate.
- Continuous monitoring and ongoing fine-tuning of the portfolio.
- Detailed reporting and documents for your tax return.

Risks

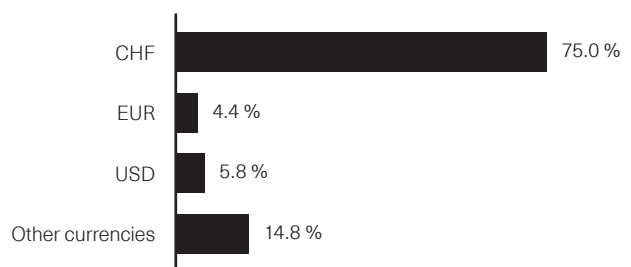
- The investment involves risks, in particular those of fluctuations in value and yield.
- Asset management offers no guarantee of positive performance.

The investments are within the following ranges (in %)¹



¹ Weighting according to the strategic benchmark (red marking)

Currency structure²



² According to the strategic benchmark

Conditions³

	All-in fee p.a.
Up to 1,000,000 CHF	1.3 %
From 1,000,000 CHF	1.2 %

³ Variant with individual Swiss shares possible from 1,000,000 CHF (+0.1 % p.a.). For more detailed information, see the Terms and conditions for investment services.

Further information can be found at
www.bkb.ch/vermoegensverwaltung



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