

BKB Investment Solution – Rule based (CHF)

The BKB Investment Solution – Rule based (CHF) is a strategic fund. From an investment amount of CHF 10,000, you can profit from the comprehensive asset management of Basler Kantonalbank and its many years of expertise gained in the investment business.

What is a rule-based investment strategy?

This type of management, based on algorithmic rules, creates systematic investment decisions that are not characterized by subjective, human decisions. The so-called rule-based approach combines three different strategy modules: “Rebalancing”, “Trend” and “Relative Strength”. The investment capital is allocated to various investment classes and adjusts dynamically to the market environment. Depending upon the tactical investment signals, the allocation may vary greatly. Investment signals are derived from clear, predefined evidence-based rules from market data. Changes in the investment signals are checked for their credibility by BKB.

The allocation of the investment classes adapts of necessity to the market environment. In difficult market phases, the allocation of the investment classes is comparable to a defensive risk profile with a lower proportion of shares. Given upward phases, advantage must be taken of investment opportunities; in so doing, the proportion of shares will be increased.

Transparent investment policy

The BKB Investment Solution – Rule based (CHF) is especially suited to investors with an increased readiness to assume risk and who prefer a dynamic investment style. Because of the very active style of investment, the investor must be prepared to accept fluctuations in value. In the index funds and ETFs deployed, cost-efficient, index-tracking management takes precedence. Your capital will be invested mainly in investments in Swiss francs.

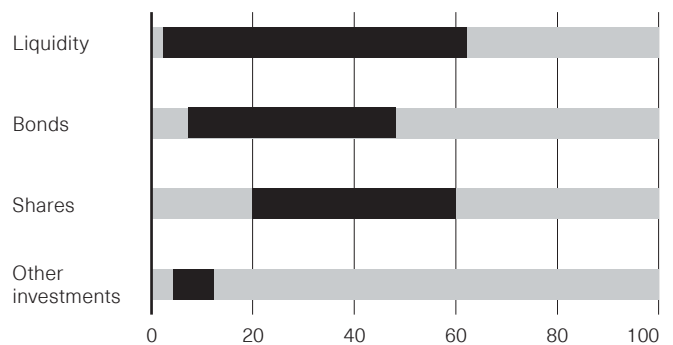
Comprehensive reporting

You will receive a report with investment commentaries and additional information semi-annually. With the performance statement and the annual Swiss tax statement, you will always have to hand an overview of your investments.

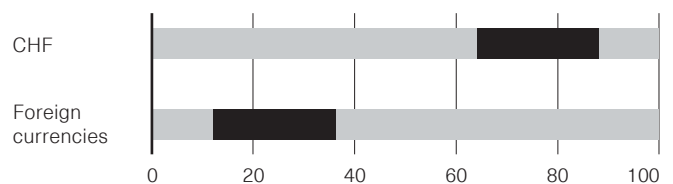
Attractive conditions

The running costs of the BKB Investment Solution – Rule based (CHF) amount to an annual 1.25 %*. There is no charge for the performance statement and an annual Swiss tax statement.

Allocation to investment classes (bandwidths in %)



Currency allocation (bandwidths in %)



This information serves advertising purposes exclusively. For the strategy fund BKB Investment Solution – Rule based (CHF), we would refer you to the prospectus and the Key Investor Information. You can get these free of charge on our website at www.bkb.ch and in paper form at all branches of Basler Kantonalbank, from the fund management or from the custody bank.

* This value is a target amount based on an estimate and may undergo slight fluctuation from year to year.

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