

Zurich, 9 February 2018

Swiss Life Investment Foundation continues on growth path

In 2017, the Swiss Life Investment Foundation was once again able to significantly increase its assets under management, as gross assets rose by 20% to close the year at CHF 7.5 billion (previous year: CHF 6.3 billion). The Swiss Life Investment Foundation is thus among the fastest growing investment foundations in Switzerland.

In the Fundo/Lipper KGAST performance comparison, the Swiss Life Investment Foundation's annual balance sheet was a success in 2017, with gross assets increasing by 20% to CHF 7.5 billion (previous year: CHF 6.3 billion). The Swiss Life Investment Foundation was thus able to successfully continue on the growth path embarked on in recent years and is among the six biggest investment foundations in Switzerland. All in all, at the end of 2017 the Swiss Life Investment Foundation served more than 420 pension funds and collective foundations as its clients.

The Swiss Life Investment Foundation's product range currently comprises a total of 24 investment groups. Stephan Thaler, Managing Director of Swiss Life Investment Foundation, says: "This past year we were once again able to successfully launch a package of three new investment vehicles. Two new investment groups for corporate bonds from emerging markets in hard currencies constituted a significant addition to our bond offerings. And with the launch of a thematic investment group in the retirement and healthcare property segment in Switzerland, we are using our many years of experience in real estate tailored to special needs, driven by demographic evolution."

Convincing performance of investment groups

Under the proven "Swiss Life Best Select Invest Plus" approach, the Swiss Life Investment Foundation investment groups are managed for the most part by Swiss Life Asset Managers – very successfully: in over 60% of the KGAST performance comparison's comparative categories, the investment groups are to be found in the three measurement periods (one, three and five years) in the first or second quartile.

Michael Klose, CEO Third-Party Asset Management at Swiss Life Asset Managers, has this to say about the results: “I am particularly pleased that we were able to post positive returns in one of our core areas, fixed-interest investments, in spite of the enduring rock-bottom interest rates, in 2017 as well, and that we again enjoyed an excellent showing by market comparison. Thus in the ‘Swiss Franc Bonds: Domestic’ and ‘Swiss Franc Bonds: Foreign’ categories, our investment groups placed in the first or second rank across all annual comparisons from one to ten years.”

Information

Media Relations

Phone +41 43 284 77 77

media.relations@swisslife.ch

www.swisslife-am.com

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Swiss Life Investment Foundation

Founded by Swiss Life Ltd in 2001, the Swiss Life Investment Foundation (SL AST) currently has more than seven and half billion CHF in total assets under management on behalf 425 pension funds and collective foundations. The range of twenty-four investment groups comprises eight Fixed Income, eight Equities and four Real Estate Switzerland products, as well as four Mixed BVG products. SL AST is a member of the Conference of Managers of Investment Foundations (KGAST) and is monitored by the supervisory oversight commission for the occupational pension system (OAK-BV).

Swiss Life Asset Managers

Swiss Life Asset Managers has 160 years of experience in managing the assets of the Swiss Life Group. This insurance background has exerted a key influence on the investment philosophy of Swiss Life Asset Managers, which is governed by such principles as value preservation, the generation of consistent and sustainable performance and a responsible approach to risks. Swiss Life Asset Managers offers this proven approach to third-party clients in Switzerland, France, Germany, Luxembourg and Great Britain.

As at 30 June 2017 assets under management for third-party clients amount to CHF 54.3 billion. Together with insurance mandates for the Swiss Life Group, total assets under management at Swiss Life Asset Managers stood at CHF 209.8 billion.

Swiss Life Asset Managers is the leading real estate manager in Europe¹. Of the assets totaling CHF 209.8 billion, CHF 46.5 billion is invested in real estate. In addition, Swiss Life Asset Managers has real estate under administration of CHF 27.8 billion through its subsidiaries Livit and Corpus Sireo. Total real estate under management and administration at the end of June 2017 thus came to CHF 74.3 billion.

Swiss Life Asset Managers employs about 1500 people in Europe.

¹ PropertyEU, Top 100 Investors, October 2015, 2016 and 2017