



Swiss Life Investment Foundation: successful opening of the “Real Estate Switzerland Retirement and Healthcare” investment group

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The Swiss Life Investment Foundation has successfully completed the opening of the "Real Estate Switzerland Retirement and Healthcare" investment group. Due to high demand, issue volume was increased to a total of CHF 151 million.

With subscriptions of some CHF 330 million (before reductions), the opening of the “Real Estate Switzerland Retirement and Healthcare” investment group in April 2019 has been a great success. In view of the high demand by just under 100 investors and a promising acquisition pipeline, a decision has been reached to increase the original subscription volume of CHF 67 million to a total of CHF 151 million by way of a supplementary offer to the subscribing investors as part of a second opening.

Stephan Thaler, Managing Director of the Swiss Life Investment Foundation, is very pleased: “The success of the opening is a tremendous vote of confidence on the part of our investors in a segment with excellent growth prospects, as well as in the Swiss Life Investment Foundation. The ‘Retirement and Healthcare’ investment group thus has just under CHF 200 million in assets now.”

The additional funds are to be used to purchase two first-class apartment buildings in Zurich’s Seefeld district. The properties in question are multigenerational and feature comprehensive services. In addition to their great location and property quality, they also enjoy a very good rating for senior housing. The acquisition increases the investment group’s diversification and long-term earnings stability.

Attractive retirement and healthcare real estate

The “Real Estate Switzerland Retirement and Healthcare” investment group responds to the demographic trend: life expectancy continues to rise in Switzerland. The share of people over age 80 as a percentage of the overall population will rise from six percent today to 11 percent by 2050, according to the Swiss Federal Statistical Office. In view of this development, the demand for age-appropriate housing is growing as well.

Information

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Swiss Life Investment Foundation

Founded by Swiss Life Ltd in 2001, the Swiss Life Investment Foundation currently has over nine and a half billion Swiss francs in gross assets under management on behalf of 450 pension funds and collective foundations. The range of 27 investment groups comprises eight fixed income, nine equity, one alternative investment and four Swiss real estate products plus five Mixed BVG products. The Swiss Life Investment Foundation is a member of the Conference of Managers of Swiss 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 more than 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. That's how we lay the groundwork for our clients to make solid, long-term plans – in self-determination and with financial confidence. Swiss Life Asset Managers offers this proven approach to third-party clients in Switzerland, France, Germany, Luxembourg and the UK.

As at 31 December 2018 assets under management for third-party clients amount to CHF 71.2 billion. Together with insurance mandates for the Swiss Life Group, total assets under management at Swiss Life Asset Managers stood at CHF 232.6 billion.

Swiss Life Asset Managers is the leading real estate manager in Europe¹. Of the assets totaling CHF 232.6 billion, CHF 62.7 billion is invested in real estate. In addition, Swiss Life Asset Managers has real estate under administration of CHF 28.5 billion through its subsidiaries Livit, Corpus Sireo and Beos. Total real estate under management and administration at the end of December 2018 thus came to CHF 91.2 billion.

Swiss Life Asset Managers employs more than 1800 people in Europe.

¹PropertyEU, Top 100 Investors, December 2018