

## Swiss Life Investment Foundation greatly expands product range with index-based investment groups and establishes full-range offering

24 October 2024

The Swiss Life Investment Foundation is expanding its offering in the area of indexed investment solutions and is launching twelve new investment groups at the end of October 2024. These will include equities, bonds and multi-asset strategies in order to meet the sharp increase in demand. With a total of 15 investment groups, the Swiss Life Investment Foundation offers the widest range of indexed solutions among the Swiss investment foundations.

The Swiss Life Investment Foundation is responding to the growing demand for indexed investment solutions and is expanding its offering with twelve new investment groups in the areas of equities, bonds and multi-asset strategies (BVG-Mix Index investment groups). The Swiss Life Investment Foundation is thus establishing itself as a leading full-range provider for Swiss employee benefits institutions.

The new investment groups offer broad diversification across various asset classes, including Swiss and global equities as well as bonds. You invest in Swiss Life Asset Managers index funds that are attractive from a tax perspective and aim to replicate the reference indices as accurately as possible while incurring minimal costs.

Swiss Life Asset Managers manages over CHF 12 billion in index-based investments for third-party clients as well as for Swiss Life insurance. By the end of 2024 and the beginning of 2025, further commitments in index solutions from Swiss Life Asset Managers of around CHF 5 billion had been made in third-party asset management.

Stephan Thaler, Managing Director of the Swiss Life Investment Foundation adds: “With the launch of our new index-based investment groups, we are establishing the Swiss Life Investment Foundation as a leading provider of comprehensive securities and real-value investments for Swiss employee benefits institutions. These new products will enable institutional investors to diversify their portfolios in a risk-conscious manner.”

## Information

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### Swiss Life Investment Foundation

Founded in 2001 by Swiss Life Ltd, the Swiss Life Investment Foundation currently has around CHF 18 billion in total assets under management on behalf of around 700 pension funds and collective foundations. It is thus one of the five largest investment foundations and has around one in two Swiss employee benefits institutions amongst its investors. The range of 32 investment groups comprises eight fixed income, ten equity, four Swiss real estate and two foreign real estate, two infrastructure products, one Mortgage Switzerland, one Senior Secured Loans product and five Mixed BVG products. The Swiss Life Investment Foundation is a member of the Conference of Managers of Investment Foundations (KGAST) and is supervised by the Occupational Pension Supervisory Commission (OAK BV).

### Swiss Life Asset Managers

Swiss Life Asset Managers has more than 165 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, the UK, Italy and the Nordic countries.

As at 30 June 2024 assets under management for third-party clients amount to CHF 116.7 billion. Together with insurance mandates for the Swiss Life Group, total assets under management at Swiss Life Asset Managers stood at CHF 262.2 billion. Swiss Life Asset Managers is a leading institutional real estate investor in Europe<sup>1</sup>. Of the assets totalling CHF 262.2 billion, CHF 87.7 billion is invested in real estate. In addition, Swiss Life Asset Managers, in cooperation with Livit, manages real estate totalling CHF 20.8 billion in value. Total real estate assets under management and administration at the end of June 2024 thus came to CHF 108.5 billion.

Swiss Life Asset Managers employs more than 2200 people in Europe.

### A financially self-determined life

Swiss Life enables people to lead a financially self-determined life and look to the future with confidence. Swiss Life Asset Managers pursues the same goal: We think long-term and act responsibly. We use our knowledge and experience to develop future-oriented investment solutions. This is how we support our customers in achieving their long-term investment objectives, which in turn also take account of their client's needs so they can plan their future in a financially self-determined manner.

<sup>1</sup> INREV Fund Manager Survey 2024 (AuM as of 31.12.2023)