

Swiss Life Asset Managers launches index funds

18 March 2024

Swiss Life Asset Managers is adding index-based investment solutions to its range of products. With “Swiss Life Index Funds (CH)”, it is offering institutional investors in Switzerland proprietary index funds in the investment categories equities and bonds for the first time. The launch of additional index funds is planned from the second quarter of 2024.

Swiss Life Asset Managers has launched the new “Swiss Life Index Funds (CH)” umbrella fund. With its expanded offering, Swiss Life Asset Managers is responding to the sharp rise in demand for passive investment solutions and is supplementing its existing product range in third-party asset management. Institutional investors, such as pension funds and insurance companies, that would like to invest in index funds in a diversified way, benefit from a broader range of investment opportunities. In addition, the new index-based investment solutions offer attractive tax features for Swiss investors.

The following sub-funds will be launched in the initial phase:

SL Index Funds (CH) Equity Switzerland All Cap
 SL Index Funds (CH) Equity Switzerland Large Cap
 SL Index Funds (CH) Equity Small & Mid Cap
 SL Index Funds (CH) Bond Swiss Francs AAA-BBB
 SL Index Funds (CH) Bond Swiss Francs AAA-BBB 1-5

From the second quarter of 2024, we intend to launch further institutional index funds that are specifically aligned to sustainability criteria.

Many years of experience in the development of index solutions

Swiss Life Asset Managers combines its many years of know-how and experience in index business with the use of proven processes and systems. As Switzerland’s third-largest institutional asset manager, Swiss Life Asset Managers can look back on over 165 years of experience in investment and risk management. The index-based assets on its own insurance balance sheet amount

to over CHF 10 billion.

Index funds

The aim of the index fund range is to cover all established traditional and ESG indices for a broadly diversified portfolio.

For all index funds, the implementation is carefully thought out based on proven processes in order to replicate the underlying reference index as precisely as possible. This gives investors maximum added value with minimum tracking error.

Individual mandates with direct investments

Specific customer needs are implemented in individual mandates with direct investments. The team responsible at Swiss Life Asset Managers has many years of experience in replicating customised indices as well as observing specific optimisation criteria and exclusion lists.

For investors who want to invest in indexed multi-asset class portfolios, we will be offering investment strategies based on our indexed investment products from the third quarter.

Stephan Elmenhorst, Head Index Solutions at Swiss Life Asset Managers, says: “I am pleased that we have been able to further extend our offering for customers with our new indexed investment solutions. The portfolio management team has a long and solid track record in the development and precise implementation of indexed investment solutions. Thanks to our expertise and experience, we provide a valued service and are ideally positioned to meet the individual needs of our customers.”

Information

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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 31 December 2023 assets under management for third-party clients amount to CHF 111.8 billion. Together with insurance mandates for the Swiss Life Group, total assets under management at Swiss Life Asset Managers stood at CHF 255.7 billion. Swiss Life Asset Managers is a leading real estate manager in Europe¹. Of the assets totalling CHF 255.7 billion, CHF 85.4 billion is invested in real estate. In addition, Swiss Life Asset Managers, in cooperation with Livit, manages real estate totalling CHF 21.2 billion in value. Total real estate assets under management and administration at the end of December 2023 thus came to CHF 106.7 billion.

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

Self-determined Life

Swiss Life enables people to lead a 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 financial future in a self-determined manner.

¹ INREV Fund Manager Survey 2023 (AuM as of 31.12.2022)

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