



## News

### Further opening of the “Real Estate Switzerland Retirement and Healthcare ESG” investment group oversubscribed several times

24 April 2025

- Opening for “Swiss Life Investment Foundation – Real Estate Switzerland Retirement and Healthcare ESG” completed successfully
- Capital to be used for an attractive acquisition and to reduce the borrowing ratio

#### **Issue oversubscribed several times over**

Following the great interest shown in the opening of the real estate investment group at the beginning of the year, the opening from 25 March to 17 April 2025 seamlessly built on the success of the first opening. The targeted volume of around CHF 130 million was significantly oversubscribed, with 63 employee benefits institutions taking part in the opening.

The new capital is being used to expand the portfolio. This has made it possible to secure a senior centre in Lugano that offers its residents comprehensive care and support services. The capital is also being used to reduce the borrowing ratio. The entitlements with an equivalent value of around CHF 130 million will be issued on 6 May 2025.

#### **Sustainable portfolio expansion**

The “Real Estate Switzerland Retirement and Healthcare ESG” investment group invests in age-appropriate residential properties, care facilities, healthcare properties and institutions promoting health in Swiss cities and their suburbs. Together with the acquisitions in December 2024 (senior care centres in Frauenfeld and Ostermundigen) and March 2025 (medical centre in Zurich and age-appropriate residential property in Porza), the Lugano property has helped successfully expand the portfolio, systematically pursuing its strategic focus on care facilities and age-appropriate housing and further increase diversification.

Stephan Thaler, Managing Director of the Swiss Life Investment Foundation, says: “Since its launch in 2017, the sustained high level of interest from investors has underlined the economic attractiveness and social significance of the thematic investment group. Thanks to growth over the past 12 months, the value of the real estate portfolio with the latest expansion will reach around CHF 1 billion.”

#### **Responsible investment**

Since 2018, Swiss Life Asset Managers has been a signatory to the UN Principles for Responsible Investment (UN PRI). Environmental, social and governance (ESG) factors are systematically integrated into the investment and risk management processes at Swiss Life Asset Managers. In the real estate investment business, appropriate criteria are taken into account in both acquisition and management. Both investment groups have also participated in the annual GRESB (Global Real Estate Sustainability Benchmark) since 2018. Thanks to its continuous optimisation process, the “Real Estate Switzerland Retirement and Healthcare ESG” investment group scored 91 points out of 100 in the overall assessment in 2024 and was awarded the maximum of five stars.

## Information

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### Swiss Life Investment Foundation

Founded in 2001 by Swiss Life Ltd, the Swiss Life Investment Foundation had CHF 19.6 bn in total assets under management on behalf of around 700 pension funds and collective foundations as at 31 March 2025. This makes it one of the top five investment foundations, with approx. one in two Swiss employee benefits institutions among its investors. The wide range of 50 investment groups comprises 13 fixed-income, 17 equity and four Swiss real estate products plus two foreign real estate, two infrastructure products, one mortgages Switzerland, one senior secured loans product and ten BVG mixed-asset products. The Swiss Life Investment Foundation is a member of the Conference of Managers of Investment Foundations (KGASt) and is monitored by the Occupational Pension Supervisory Commission (OPSC).

### 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 2024 assets under management for third-party clients amount to CHF 124.7 billion. Together with insurance mandates for the Swiss Life Group, total assets under management at Swiss Life Asset Managers stood at CHF 272.3 billion. Swiss Life Asset Managers is a leading institutional real estate investor in Europe<sup>1</sup>. Of the assets totalling CHF 272.3 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 December 2024 thus came to CHF 108.4 billion. Swiss Life Asset Managers employs more than 2300 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> #2 IPE Top 150 Real Estate Investment Managers 2024 Ranking Europe, #2 INREV Fund Manager Survey 2024

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