



News

Opening of the “Real Estate Switzerland ESG” investment group of up to around CHF 450 million

6 May 2025

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- The issue proceeds will be used to acquire a first-class property portfolio

Opening of the “Real Estate Switzerland ESG” investment group

The Swiss Life Investment Foundation is planning to open the “Real Estate Switzerland ESG” investment group. Entitlements of up to around CHF 450 million will be issued as part of this opening. The new capital will be used to acquire a first-class real estate portfolio. The properties are being acquired from Swiss Life Ltd and consist primarily of residential properties in well-connected suburbs. The subscription period will run from 6 May 2025 to 13 June 2025. The entitlements will be issued on 3 July 2025.

Following the two successful openings of the “Real Estate Switzerland Retirement and Healthcare ESG” investment group in January and March, investors now also have the opportunity to invest in the “Real Estate Switzerland ESG” investment group that focuses on residential properties of various sizes and years of construction and is broadly diversified geographically. It aims to achieve earnings stability and sustainable growth through targeted investments.

The investment group was launched on 30 November 2009 and has performed successfully since then. With a market value of over CHF 4.9 billion, it is one of the major investment vehicles in the Swiss real estate

market. Since its launch, the investment group has posted an impressive net performance of 5.29% per year (as at 31 March 2025).

Stephan Thaler, Managing Director of the Swiss Life Investment Foundation: “We are delighted with the successful performance of this 15-year-old investment group, from which around 500 investors currently benefit. This underlines the attractiveness of the investment group and the confidence in the expertise of Swiss Life Asset Managers.”

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. The investment group has also participated in the annual GRESB (Global Real Estate Sustainability Benchmark) since 2018. Thanks to its continuous optimisation process, the “Real Estate Switzerland ESG” investment group scored 88 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 four 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 Europe¹. 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.

¹ #2 IPE Top 150 Real Estate Investment Managers 2024 Ranking Europe, #2 INREV Fund Manager Survey 2024

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