News

Swiss Life Investment Foundation: Opening of the "Real Estate Switzerland ESG" investment group with an issuance volume of approximately CHF 500 million

26 November 2026

- Opening of "Real Estate Switzerland ESG" investment group by issuing entitlements of around CHF 500 million
- The issue proceeds will be used to acquire prime real estate; the borrowing ratio remains at a low level

The Swiss Life Investment Foundation is planning to open the Real Estate Switzerland ESG investment group. Entitlements totalling approximately CHF 500 million will be issued as part of this opening. The new capital will be used to acquire prime real estate. Following the opening, the investment group's borrowing ratio will be reduced back to its original level. The properties are being acquired from Swiss Life Ltd and on the transaction market. They comprise a balanced mix of residential and commercial assets in attractive locations with excellent transport links. The subscription period will run from **11 January to 26 February 2027 (1:00 p.m.)**. The entitlements will be issued on 12 March 2027 with a value date of 17 March 2027.

The investment group invests in residential properties of varying sizes and is broadly diversified across different regions. Targeted investments in the existing portfolio, together with the selective acquisition of additional properties, enhance income stability and create the foundation for the portfolio's sustainable growth.

The investment group was launched on 30 November 2009 and has performed well since then. With a market value of over CHF 6 billion and more than 320 properties, it ranks among the leading real estate investment vehicles in the Swiss property market. Since launch, the investment group has delivered a net annual return of 5.31% (as at 30 September 2026) and outperformed the KGAST Real Estate Index by approximately 16 basis points per annum over the same period.

Sonja Spichtig, Managing Director of the Swiss Life Investment Foundation: "We are pleased with the investment group's strong performance, from which more than 500 investors benefit today. This underlines the attractiveness of the investment group and the confidence placed 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. From 2018 to 2026, the investment group participated in the annual Global Real Estate Sustainability Benchmark (GRESB). In 2026, the Real Estate Switzerland ESG investment group scored 89.4 out of 100 points in the overall assessment and was awarded a 4-star rating.

The portfolio's decarbonisation strategy continues to be consistently implemented. At the same time, the measurement of sustainability performance is continuously being refined and further developed. Going forward, the three directly investing real estate investment groups of the Swiss Life Investment Foundation will place greater emphasis on impact-oriented metrics, particularly those relating to the decarbonisation of their portfolios and the benchmarking of energy and CO_2 performance against relevant Swiss market participants through REIDA.

Information

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Swiss Life Investment Foundation
The Swiss Life Investment Foundation was founded on 22 June 2001 by the former Swiss Life Insurance and Pension Company, now Swiss Life Ltd. It is a foundation established pursuant to Art. 80 et seq. of the Swiss Civil Code and is dedicated to the collective investment and management of assets entrusted to it by employee benefits institutions. The Swiss Life Investment Foundation is headquartered in Zurich, is a member of KGAST (Conference of Managers of Investment Foundations) and is subject to the Occupational Pension Supervisory Commission (OPSC). As at 30 September 2026, the Swiss Life Investment Foundation had total assets of CHF 22.6 billion under management. Around 700 pension funds and collective foundations entrust their assets to the Investment Foundation, meaning that one in two Swiss employee benefits institutions is amongst its investors. It is the fastest-growing investment foundation of the past ten years and the fourth-largest investment foundation in Switzerland.

Swiss Life Asset Managers
Swiss Life Asset Managers has 165 years of experience in managing the assets of the Swiss Life Group. This insurance background has exerted a key influence on its investment philosophy, which is governed by such principles as value preservation, the generation of consistent and sustainable earnings and a responsible approach to risks. Swiss Life Asset Managers also offers this proven approach to third-party clients in multiple European locations.

As at 30 June 2026, Swiss Life Asset Managers managed a total volume of CHF 300.8 billion in assets for the Swiss Life Group, including over CHF 157.6 billion for third-party asset management. Swiss Life Asset Managers is also a leading institutional real estate investor[1] in Europe, with CHF 90.2 billion of a total volume of CHF 300.8 billion in assets under management invested in real estate. In addition, Swiss Life Asset Managers, in cooperation with Livit, manages real estate worth a total of CHF 24.8 billion. Total real estate under management as at the end of June 2026 thus stood at CHF 115 billion. Swiss Life Asset Managers has over 2300 employees in Europe.

A financially self-determined life
Swiss Life enables people to live a financially self-determined life so they can 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. That's how we support our customers in achieving their long-term investment objectives. This in turn helps their customers to plan long term and act with financial self-determination.

1 #2 IPE Top 150 Real Estate Investment Managers 2025 (European ranking), #2 INREV Fund Manager Survey 2026

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