31.03.2024

LIBERTY Green

Green Invest 80

Description

The "Green invest 80" strategy is a carefully selected investment portfolio implementing a highly sustainable approach, containing about 30 individual securities. Equities are selected according to a clearly defined quantitative selection process, taking into account various criteria including return, risk, and sustainability. The equities exposure is capped at 80%.

Contact

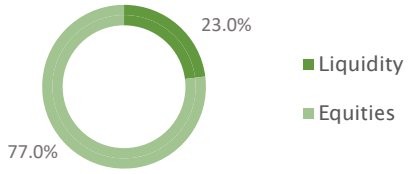
LibertyGreen Foundation for 3a Retirement Savings

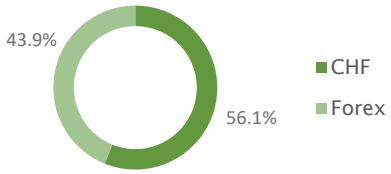
Mail info@liberty.ch

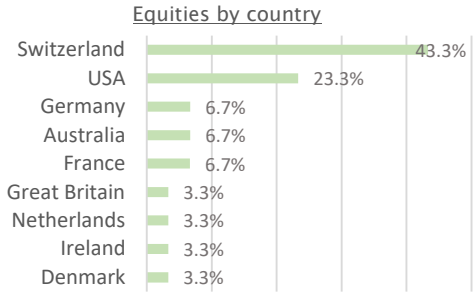
Phone +41 58 733 04 04

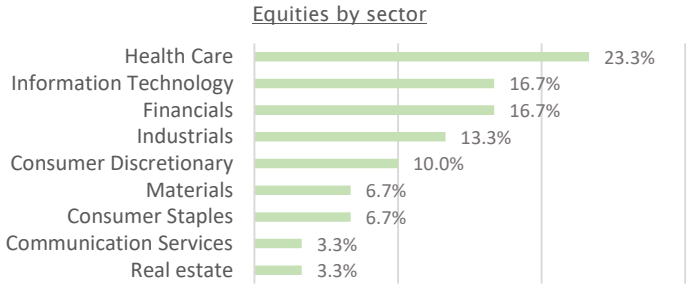
Web www.LibertyGreen.ch

Portfolio composition

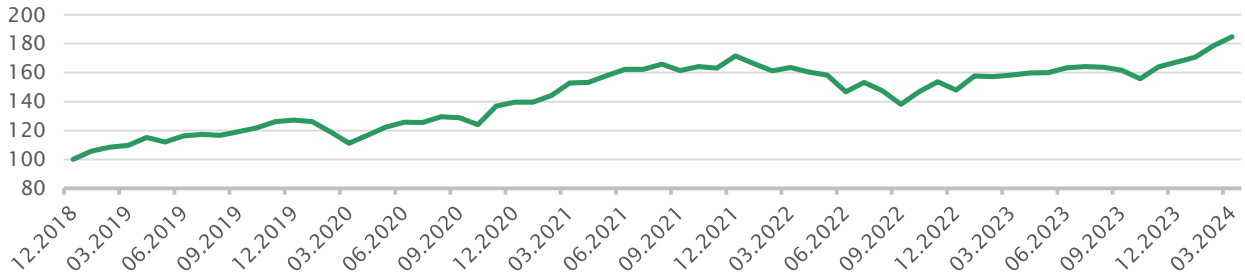








Performance (indexed, in CHF)*



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Year
2024	2.10%	4.61%	3.49%										10.54%
2023	6.42%	-0.25%	0.78%	0.88%	0.12%	2.10%	0.50%	-0.27%	-1.30%	-3.54%	5.23%	1.98%	12.96%
2022	-3.04%	-3.01%	1.47%	-1.94%	-1.36%	-7.27%	4.48%	-3.82%	-6.30%	6.39%	4.56%	-3.66%	-13.64%
2021	-0.10%	3.32%	6.04%	0.27%	3.05%	2.72%	0.08%	2.16%	-2.66%	1.64%	-0.60%	5.07%	22.74%
2020	-0.74%	-5.59%	-6.61%	4.91%	4.87%	2.67%	-0.10%	3.14%	-0.49%	-3.63%	10.31%	2.02%	9.92%

	YTD	1 Year	3 Years p.a.
Performance*	10.54%	16.73%	6.54%

*Performance according to model calculation. In practice, deviations are to be expected (e.g. different timing of rebalancing, no consideration of foundation fees, taxes and spreads).
Grey shaded performance figures are based on a historical simulation with monthly rebalancing by backcalculating the portfolio composition as of September 1, 2021.

Investment philosophy

In addition to profitable capital accumulation for the future, the environment is to be protected and the climate balance improved. To this end, we have created an investment portfolio that stands for responsible, ethical, social, and ecological investment. These aspects of sustainable investment complement the traditional investment criteria of profitability, liquidity, and security. To illustrate the impact, we have developed a sustainability calculator on LibertyGreen.ch that shows what the LibertyGreen portfolio can achieve.

Disclaimer

For further information, please contact your consultant. Past performance is no indication of future performance and no guarantee of future values or results.