



Strategische Asset Allokation & Bandbreiten

Anlagekategorien	Zinsertrag			Einkommen			Ausgewogen			Wachstum			Kapitalgewinn		
	min.	neutral	max.	min.	neutral	max.	min.	neutral	max.	min.	neutral	max.	min.	neutral	max.
Liquidität	0%	5%	30%	0%	5%	30%	0%	5%	30%	0%	5%	30%	0%	5%	30%
Obligationen	70%	90%	100%	40%	60%	80%	20%	40%	60%	0%	15%	35%	0%	0%	20%
Aktien	0%	0%	0%	10%	25%	40%	25%	45%	65%	50%	70%	90%	70%	90%	100%
Immobilien	0%	5%	15%	0%	5%	15%	0%	5%	15%	0%	5%	15%	0%	0%	10%
Alternative Anlagen	0%	0%	25%	0%	5%	25%	0%	5%	25%	0%	5%	25%	0%	5%	25%
Total		100%			100%			100%			100%			100%	

Strategische Währungsallokation & Bandbreiten

Anlagekategorien	Zinsertrag			Einkommen			Ausgewogen			Wachstum			Kapitalgewinn		
	min.	neutral	max.	min.	neutral	max.	min.	neutral	max.	min.	neutral	max.	min.	neutral	max.
CHF	55%	70%	100%	50%	65%	100%	40%	55%	80%	35%	50%	75%	25%	40%	75%
Fremdwährungen	0%	30%	45%	0%	35%	50%	20%	45%	60%	25%	50%	65%	25%	60%	75%
Total		100%			100%			100%			100%			100%	

Strategische Währungsallokation & Bandbreiten (Vermögensverwaltung Helvetia / Exklusiv Swiss Style)

Anlagekategorien	Zinsertrag			Einkommen			Ausgewogen			Wachstum			Kapitalgewinn		
	min.	neutral	max.	min.	neutral	max.	min.	neutral	max.	min.	neutral	max.	min.	neutral	max.
CHF	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Fremdwährungen	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Total		100%			100%			100%			100%			100%	