

This Factsheet is intended for marketing purposes only.

- Strolling
- Walking
- Hiking
- Mountaineering
- Climbing

arvy 3a Climbing Strategy

The arvy Climbing Strategy lets you invest regularly through your 3a plan or with a one-off amount, targeting long-term growth with a high equity share. It invests globally in equities and diversifies with bonds. Short-term fluctuations may be more pronounced given its growth-oriented profile.

All arvy co-founders invest their own money in this same strategy, contributing monthly. This ensures full alignment with our investors — we grow alongside you.

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Performance (one -time investment of CHF 10,000 after fees)



Equity performance up to and including November 2023, and bond performance up to and including July 2015, is based on index data that includes management, custody, and operational costs. From December 2023 and August 2015 onwards, respectively, the data shows the performance after management & custody fees and product costs for a one-time investment of CHF 10'000. Past performance is no guarantee of future market developments.

Asset Classes

Table with 2 columns: Asset Class, Allocation. Rows: Equities (97%), Bonds (0%), Liquidity (3%).

Performance Simulation (CHF 10,000 after fees)

Table with 2 columns: Metric, Value. Rows: Cumulative return over 5 years (CHF 14,787), Cumulative return over 10 years (CHF 20,964), Avg. yearly return over last 5 years (8.13%), Avg. yearly return over last 10 years (7.68%), Avg. Volatility over the last 10 years (13.96%), Biggest yearly loss (-39.85%).

Investment Overview

Table with 2 columns: Investor Goal, Return Maximisation; Minimum Investment, CHF 1; Investment Cycle, Mid- and Start of Month; Investment Horizon, 7+ years; Number of Investments, 30-35.

Own Iconic Brands, among others



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