

This Factsheet is intended for marketing purposes only.

Strolling

Walking

Hiking

Mountaineering

Climbing

arvy 3a Mountaineering Strategy

The arvy Mountaineering Strategy lets you invest through regular 3a savings or with a one-off amount, focusing on long-term capital growth through a higher equity allocation. The strategy participates in global stock markets while maintaining diversification through a complementary bond exposure. Short-term volatility is possible, reflecting the more growth-oriented positioning.

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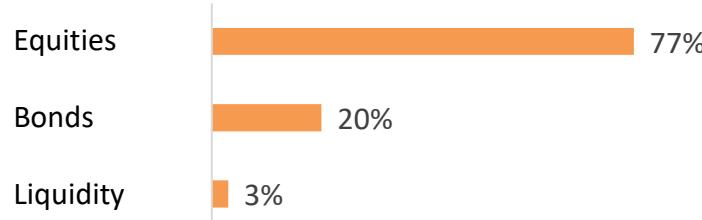
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Performance (one -time investment of CHF 10,000 after fees)



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



Performance Simulation (CHF 10,000 after fees)

Cumulative return over 5 years	CHF 13,522
Cumulative return over 10 years	CHF 18,994
Avg. yearly return over last 5 years	6.22%
Avg. yearly return over last 10 years	6.62%
Avg. Volatility over the last 10 years	11.64%
Biggest yearly loss	-31.29%

Investment Overview

Investor Goal	Wealth Accumulation
Minimum Investment	CHF 1
Investment Cycle	Mid- and Start of Month
Investment Horizon	7+ years
Number of Equities	30-35

Own Iconic Brands, among others

