

01.04.2021

Pax Fonds-Portfolio Zielrendite

Regionen	Anlagekategorien				Total
	Aktien	Obligationen	Liquidität	Alternative Anlagen	
Schweiz	6.0% Pax (CH) Fonds Aktien Schweiz ALVN T (4.0%) UBS (CH) IF - Equities Switzerland Passive All I-X (2.0%)	51.0% UBS (CH) IF3 - Bonds CHF Inland Medium Term Passive II I-X (20.0%) UBS (CH) IF3 - Bonds CHF Ausland Medium Term Passive II I-X (19.0%) LO Funds (CH) - Swiss Franc Credit Bond I (12.0%)	3.0% UBS (CH) IF3-Bonds CHF Short Term II I-X (3.0%)	8.0% UBS ETF (CH) SXI Real Estate® (CHF) A-dis (3.0%) HELVETIA (CH) Swiss Property Fund (CHF) (5.0%)	68.0%
Europa	2.0% Pax (CH) Fonds Aktien Europa ex Schweiz ALVN T (1.0%) UBS (CH) IF - Equities Europe Passive II I-X (1.0%)	2.0% UBS (Lux) IF - Euro Corporate Bonds XA (2.0%)			4.0%
Nordamerika	2.0% Vontobel Fund - US Equity - I (1.0%) UBS (Hr) ETF plc MSCI USA UCITS ETF (USD) A-ACC (1.0%)				2.0%
Japan & Pazifik	1.0% UBS (CH) IF - Equities Japan Passive II I-X (1.0%)				1.0%
Schwellenländer	2.0% UBS (CH) IF - Equities Emerging Markets Global Passive II (CHF) I-X (1.0%) Vontobel Fund - mtx Sustainable Emerging Markets Leaders - I (1.0%)				2.0%
Global / Diverse		15.0% UBS (CH) IF - Global Corporate Bonds Climate Aware (CHF hedged) II I-X (15.0%)		8.0% JSS Sustainable Equity - Real Estate Global - I EUR (4.0%) UBS ETF (CH) GOLD (USD) A-dis (4.0%)	23.0%
Total	13.0%	68.0%	3.0%	16.0%	100.0%