



Swiss Life Investment Foundation continues its growth course and opens the investment group “Real Estate Switzerland Retirement and Healthcare”

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In 2018, the Swiss Life Investment Foundation once again increased assets under management substantially, with gross assets rising by 13 percent as of the end of 2018 to CHF 8.5 billion (previous year: CHF 7.5 billion). It is thus one of the six largest investment foundations in Switzerland.¹ It plans to open the investment group “Real Estate Switzerland Retirement and Healthcare” on 2 May 2019 with a volume of around CHF 67 million. The target group of this offering are Swiss pension funds, which would like to invest in a segment with an attractive growth outlook.

The thematic investment group “Real Estate Switzerland Retirement and Healthcare” was launched in December 2017 and invests in properties in the area of age-appropriate and assisted housing, care institutions and healthcare properties. As of 31 January 2019, the investment group, which has nearly 200 investors, has a property portfolio with a total value of CHF 91.3 million. Most recently, in November 2018 it purchased the “Oase Rümliang” senior centre with modern, age-appropriate residences, an integrated residential care group and shared infrastructure.

The investment group had a net performance of 5.18 percent in 2018. Furthermore, it has identified a number of suitable properties that offer promising acquisition opportunities over the past year. The upcoming opening is intended to finance the purchase of existing properties and construction projects and reduce debt financing. The subscription period begins on 2 April and ends on 18 April 2019. The Swiss Life Investment Foundation will initially be presenting this offering to interested investors at its General Meeting of Investors on 6 March 2019.

Attractive retirement and healthcare real estate

Stephan Thaler, Managing Director of Swiss Life Investment Foundation, says: “Life expectancy continues to rise in Switzerland: the share of people over age 80 as a percentage of the overall population will rise from 6 percent today to 11 percent by 2050. In view of this development, the demand for age-appropriate housing is growing as well. The investment group “Real Estate Switzerland Retirement and Healthcare” provides the corresponding infrastructure while simultaneously presenting an attractive investment opportunity to institutional investors.”

¹ Conference of Managers of Investment Foundations (KGAST)

Information

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Swiss Life Investment Foundation

Founded by Swiss Life Ltd in 2001, the Swiss Life Investment Foundation currently has over CHF 8.5 billion in gross assets under management on behalf of 425 pension funds and collective foundations. The range of 27 investment groups comprises eight fixed income, nine equity, one alternative investment and four Swiss real estate products plus five Mixed BVG products. The Swiss Life Investment Foundation is a member of the Conference of Managers of Swiss Investment Foundations (KGAST) and is monitored by the supervisory oversight commission for the occupational pension system (OAK-BV).

Swiss Life Asset Managers

Swiss Life Asset Managers has over 160 years of experience in managing the assets of the Swiss Life Group. This insurance background has exerted a key influence on the investment philosophy of Swiss Life Asset Managers, which is governed by such principles as value preservation, the generation of consistent and sustainable performance and a responsible approach to risks. This tried and tested approach means that Swiss Life Asset Managers is also available to third-party customers in Switzerland, France, Germany, Luxembourg and the UK. As at 30 June 2018, Swiss Life Asset Managers managed a total volume of CHF 225.1 billion in assets for the Swiss Life Group, including over CHF 64 billion for third-party asset management. Swiss Life Asset Managers is also Europe's leading real estate manager² with CHF 54.4 billion of a total volume of CHF 225.1 billion in assets under management invested in real estate. In addition, Swiss Life Asset Managers has real estate under administration of CHF 29.2 billion through its subsidiaries Livit and Corpus Sireo. Total real estate under management at the end of June 2018 thus stood at CHF 83.6 billion. Swiss Life Asset Managers has over 1600 employees in Europe.

² PropertyEU Top 100 Investors, December 2018