

Swiss Life Investment Foundation and Swiss Life Asset Managers plan new collective investments for sustainable mortgages

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The Swiss Life Investment Foundation and Swiss Life Asset Managers are launching new collective investments for sustainable mortgages. These comprise a Swiss investment fund for qualified investors and an investment group for Swiss pension funds. The target volume is at least one billion Swiss francs.

The new Swiss investment fund "Swiss Life ESG Mortgage Fund" and the "Mortgages Switzerland ESG" investment group enable investments in Swiss mortgages that meet the sustainability criteria stipulated by Swiss Life Asset Managers. These include environmental objectives such as containing climate change and pollution and protecting the ecosystems. These sustainability targets are intended to create benefits for mortgagors and investors. The investment fund was launched at the start of July 2021, and the investment group will follow in the second half of the year.

Advantages of mortgages as an asset class

In addition to the Swiss bond market, mortgages offer additional opportunities both to diversify your investment portfolio and to invest on a secured basis in Swiss francs over the long term. When lending, there is a strong focus on debtor creditworthiness, sustainability and collateralisation.

Sustainable mortgages

These innovative investment solutions are among the first collective mortgage investments in Switzerland to be managed according to sustainability criteria. The investment vehicles invest according to separate criteria in mortgages that finance sustainable and energy-efficient buildings and energy-efficiency promoting renovations. The aim is to make an effective contribution to reducing greenhouse gas emissions in Switzerland by promoting the environmental sustainability of the building stock.

Longstanding experience in the mortgages segment

Swiss Life has been in the mortgage business since 1858. Swiss Life Asset Managers has managed an insurance mortgage portfolio for over a decade, currently worth around CHF 10 billion.

Information

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Swiss Life Asset Managers

Swiss Life Asset Managers has more than 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. That's how we lay the groundwork for our clients to make solid, long-term plans – in self-determination and with financial confidence. Swiss Life Asset Managers offers this proven approach to third-party clients in Switzerland, France, Germany, Luxembourg and the UK.

As at 30 June 2021 assets under management for third-party clients amount to CHF 98.9 billion. Together with insurance mandates for the Swiss Life Group, total assets under management at Swiss Life Asset Managers stood at CHF 274.4 billion. Swiss Life Asset Managers is a leading real estate manager in Europe¹. Of the assets totalling CHF 274.4 billion, CHF 81.8 billion is invested in real estate. In addition, Swiss Life Asset Managers, in cooperation with Livit, manages real estate totalling CHF 28.8 billion in value. Total real estate under management and administration at the end of June 2021 thus came to CHF 110.6 billion.

Swiss Life Asset Managers employs more than 2400 people in Europe.

¹ INREV Fund Manager Survey 2021 (AuM as of 31.12.2020)

Swiss Life Investment Foundation

Founded in 2001 by Swiss Life Ltd, the Swiss Life Investment Foundation currently has total assets of CHF 14 billion entrusted to it by more than 680 pension funds and collective foundations. This makes it one of the top five investment foundations, with over one in three Swiss employee benefits institutions among its investors. The range of 30 investment groups comprises eight fixed-income, eight equity and four Swiss real estate products plus two foreign real estate and two infrastructure products, one alternative investment product and five BVG mixed-asset products. Swiss Life Investment Foundation is a member of the Conference of Managers of Investment Foundations (KGAST) and is monitored by the Occupational Pension Supervisory Commission (OPSC).

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