



SmartFlex Choose your investment theme

AXA's investment themes enable you to invest your money according to your own convictions. All investment themes each consist of an equity fund. These funds are broadly diversified and are subject to AXA's exclusion criteria.



Sustainability

Meeting the two-degree climate target

Investments are made in companies working toward a carbon-neutral economy (net-zero target by 2050). Manufacturers of climate-friendly technology such as wind power make up around 20% of the portfolio.

Active management
AXA Investment Manager

Approx. 200 companies

Foreign currency risks
approx. 85% hedged in CHF

Market: worldwide

Fund costs¹: 0.26% p.a.
(normal²: 0.87% p.a.)

Switzerland

Focus on medium-sized companies

Investments are made in hand-picked Swiss companies that have high growth potential on account of their leading positions in their sectors.

Active management
AXA Investment Manager

Approx. 30 companies

No foreign currency risks

Market: Switzerland

Fund costs¹: 0.39% p.a.
(normal²: 1.57% p.a.)

Future trends

Tomorrow's markets

Investments are made in companies that apply future-oriented business models to make targeted use of technological, social or demographic changes in sectors such as robotics and cleantech.

Active management
AXA Investment Manager

Approx. 30 companies

Foreign currency risks
approx. 100% hedged in CHF

Market: Switzerland
and Europe

Fund costs¹: 0.35% p.a.
(normal²: 1.57% p.a.)

Global

Globally diversified

The objective is performance in line with the global equities market. This is achieved through broad diversification across regions (including emerging economies) and sectors.

Passive management
Blackrock Investment
Management

Approx. 900 companies

Foreign currency risks
approx. 85% hedged in CHF

Market: worldwide

Fund costs¹: 0.16% p.a.
(normal²: 0.67% p.a.)

Invest with a clear conscience

- No matter which investment theme you select, AXA excludes companies in sectors such as tobacco, controversial weapons, coal, oil, gas, and others.

Terms and conditions as pension funds

- Fund terms and conditions that otherwise only apply to institutional investors (such as pension funds) or major investors
- Cost advantage of more than 1% p.a. depending on the fund

Investment risks minimized

- Broad diversification: The single-security risk is minimized by consistent diversification across a large number of companies.
- Long investment horizon: Every investment in equities is exposed to market fluctuations that are reduced over a long-term investment horizon.
- In addition for offers with regular premiums: By making regular payments, you can benefit from low purchase prices when equity prices fall (average cost method).

Change your investment theme

You can change your investment theme at any time.

AXA.ch
24-hour phone:
0800 809 809
Customer portal:
myAXA.ch

¹ The „running costs“ are shown as fund costs. These include the total expense ratio (TER). No fees for purchases and sales of fund units, nor issue or redemption commissions are incurred.

² Terms and conditions for investors without the special conditions for SmartFlex