

Everon Smart Global Markets - Global

FEATURES

Strategy profile:	Passive
Investment instruments:	ETFs, Funds
Strategy implementation:	Collective investments
Focus:	Global
Minimum investment:	CHF 5'000 (or CHF 100 with Savings plan)
Top-up:	Minimum CHF 100
Investment:	Monthly
Performance reporting:	Everon App

WHAT IS EVERON SMART GLOBAL MARKETS?

Everon Smart Global Markets is an investment strategy that follows the development of global financial markets and is characterized by broad diversification and lower volatility.

The objective of the strategy is to generate a slight risk-adjusted outperformance of the market through targeted allocation to regions and sectors and by selecting the best instruments.

This strategy is primarily aimed at clients who desire a less opportunistic approach than the Everon Multifactor strategies.

The strategy takes a global approach with a primary focus on Switzerland, North America and Europe.

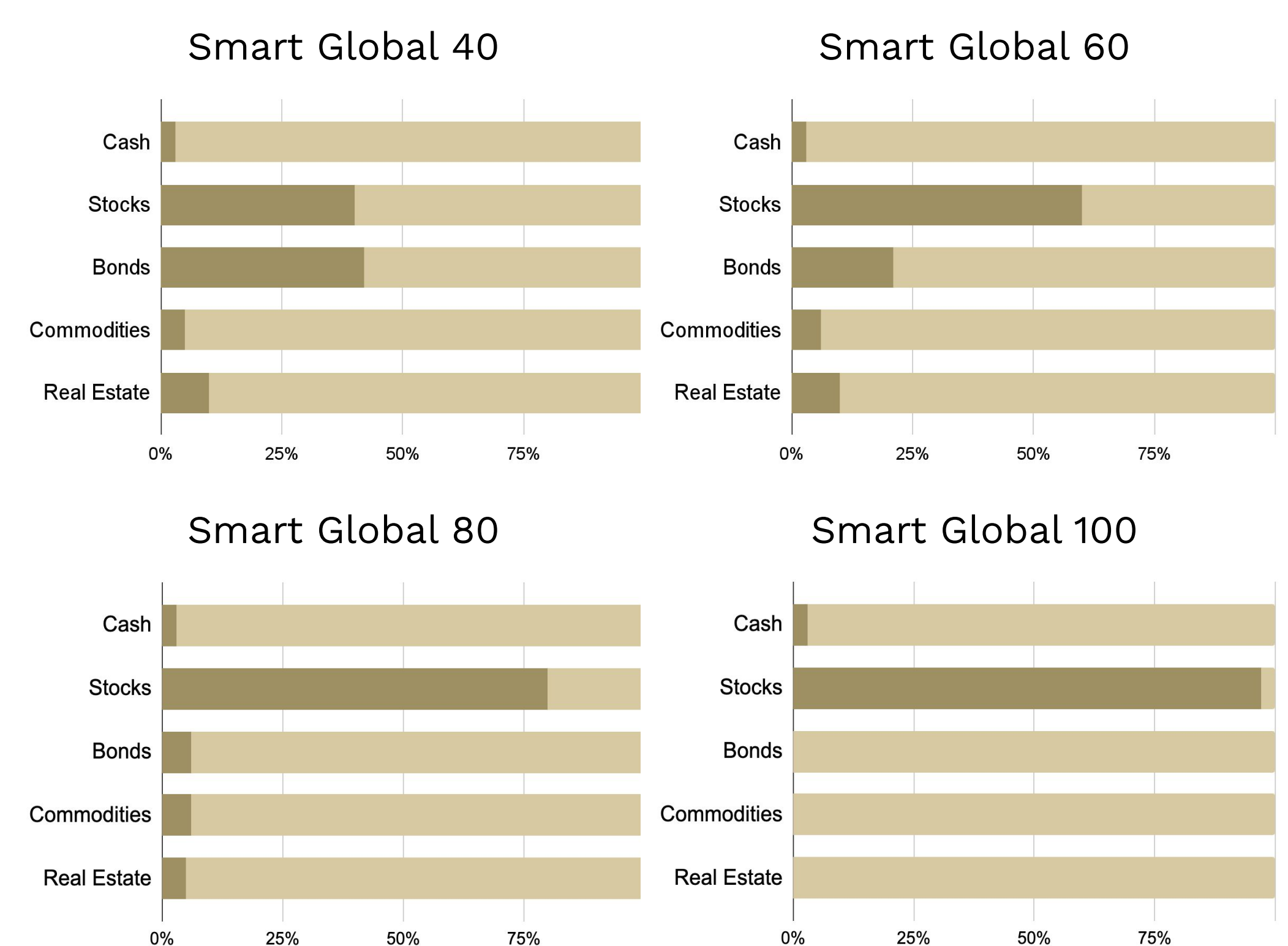
HOW DO WE BUILD YOUR PORTFOLIO?

First, your risk profile is determined in the app based on a few questions. This serves as an orientation for you and for us as to how much risk suits you. The profile is then translated into an equity quota and forms the basis of the so-called asset allocation.

You have the opportunity to select a risk profile, whose allocation of equities, bonds, real estate and commodities corresponds to your preference (40%, 60%, 80%, 100%).

With or without personalization: we ensure a good diversification across currencies, regions and sectors at all times.

ASSET ALLOCATION BY RISK PROFILE

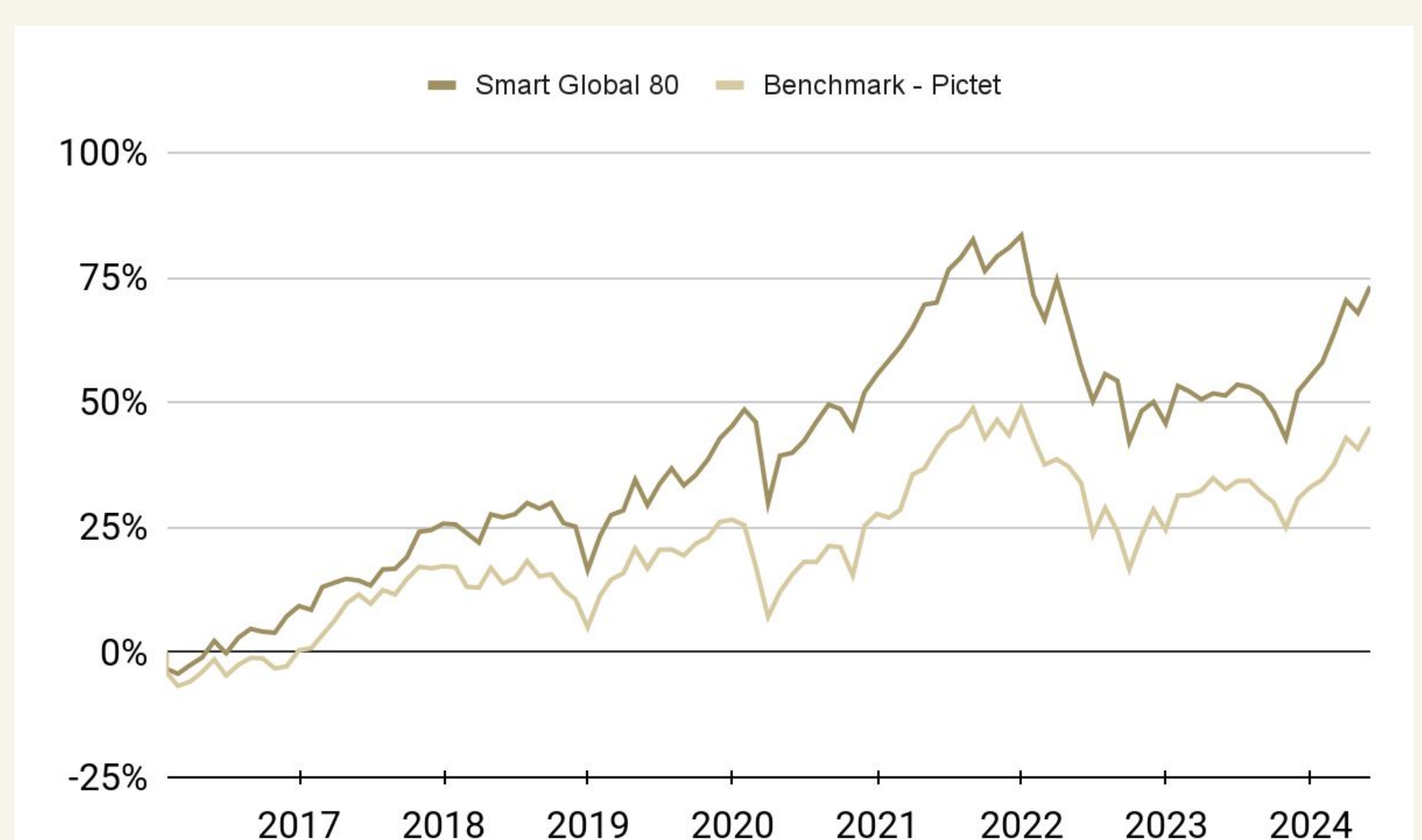


PERFORMANCE

Annual return	2016	2017	2018	2019	2020	2021	2022	2023	2024
Smart Global 40	7.99%	10.1%	-5.0%	16.0%	5.2%	8.4%	-17.1%	3.5%	6.0%
Smart Global 60	8.6%	12.6%	-6.2%	20.5%	6.2%	13.7%	-18.4%	4.2%	8.8%
Smart Global 80	9.3%	15.1%	-7.4%	24.7%	7.1%	17.9%	-20.5%	6.4%	11.7%
Smart Global 100	9.3%	17.1%	-8.8%	27.2%	7.3%	22.2%	-22.2%	8.4%	13.4%

Annualized 2016-2024	Return p.a.	Volatility p.a.
Smart Global 40	3.7%	7.06%
Smart Global 60	5.2%	8.85%
Smart Global 80	6.7%	10.71%
Smart Global 100	7.6%	12.64%

Performance of an investment made in January 2016



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About Everon:

Everon is a digital wealth manager that not only provides top-notch client service, but also leverages technology to deliver a family office-like experience to its clients. We stand for full transparency in fee structure, direct communication with our clients and excellent investment strategies.

BILANZ

Best Wealth Manager in Switzerland
2023, 2020 (Top 5)
2022 (1st place)
2024, 2021 (2nd place)