

Everon Income Global

FEATURES

Strategy profile:	Conservative
Investment instruments:	Stocks, Bonds, ETFs, Funds
Strategy implementation:	Direct investments, Collective investments
Focus:	Global
Minimum investment:	CHF 30'000
Top-up:	minimum CHF 300
Investment:	Monthly
Performance reporting:	Everon App

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.

Finally, you have the opportunity to specify preferences, which we take into account in the portfolio construction.

1. Selection of a risk profile, whose allocation of equities, bonds, real estate and commodities corresponds to your preference (40%, 60%, 80%, 100%).
2. In addition, you can also explicitly include or exclude individual titles.

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

PERFORMANCE

Annual return	2016	2017	2018	2019	2020	2021	2022	2023	2024
Income 40	6.35%	9.8%	-4.6%	17.5%	2.4%	12.3%	-9.6%	4.3%	12.3%
Income 60	6.3%	12.1%	-5.4%	22.4%	1.3%	17.5%	-9.2%	4.3%	16.0%
Income 80	6.2%	14.1%	-6.0%	25.7%	-0.1%	22.2%	-8.5%	4.7%	19.0%
Income 100	6.1%	16.0%	-6.7%	28.5%	-1.5%	26.8%	-7.8%	4.5%	20.7%
Annualized 2016-2024					Return p.a.		Volatility p.a.		
Income 40					5.3%		7.70%		
Income 60					6.8%		9.43%		
Income 80					8.0%		11.17%		
Income 100					8.8%		12.93%		

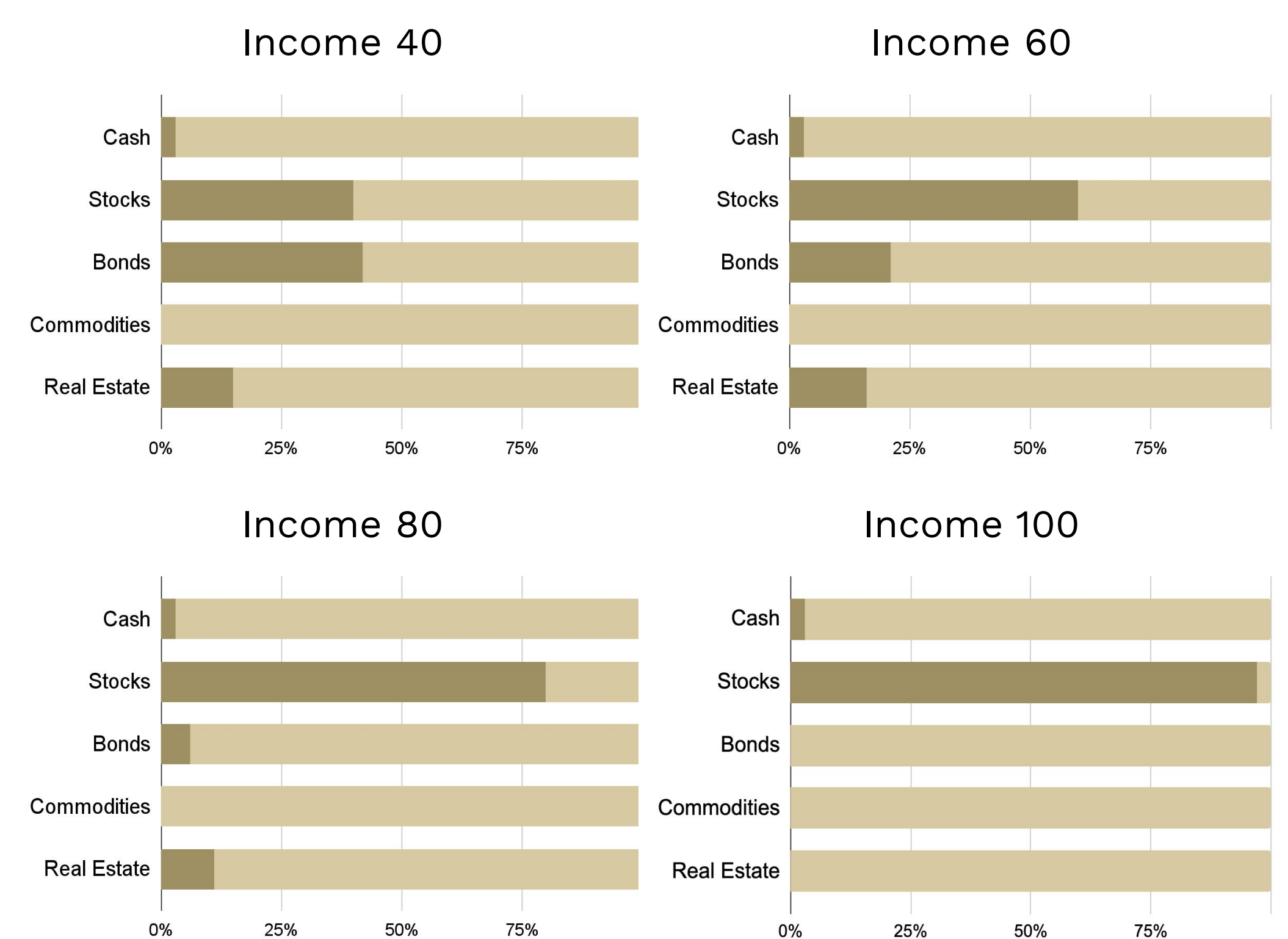
WHAT IS EVERON INCOME GLOBAL?

Everon Income Global is designed to generate regular and stable income. Asset classes such as bonds, real estate and high-dividend equities are used for this purpose. Bonds and real estate in particular are inherently designed to generate regular cash flows through coupon payments and rental income.

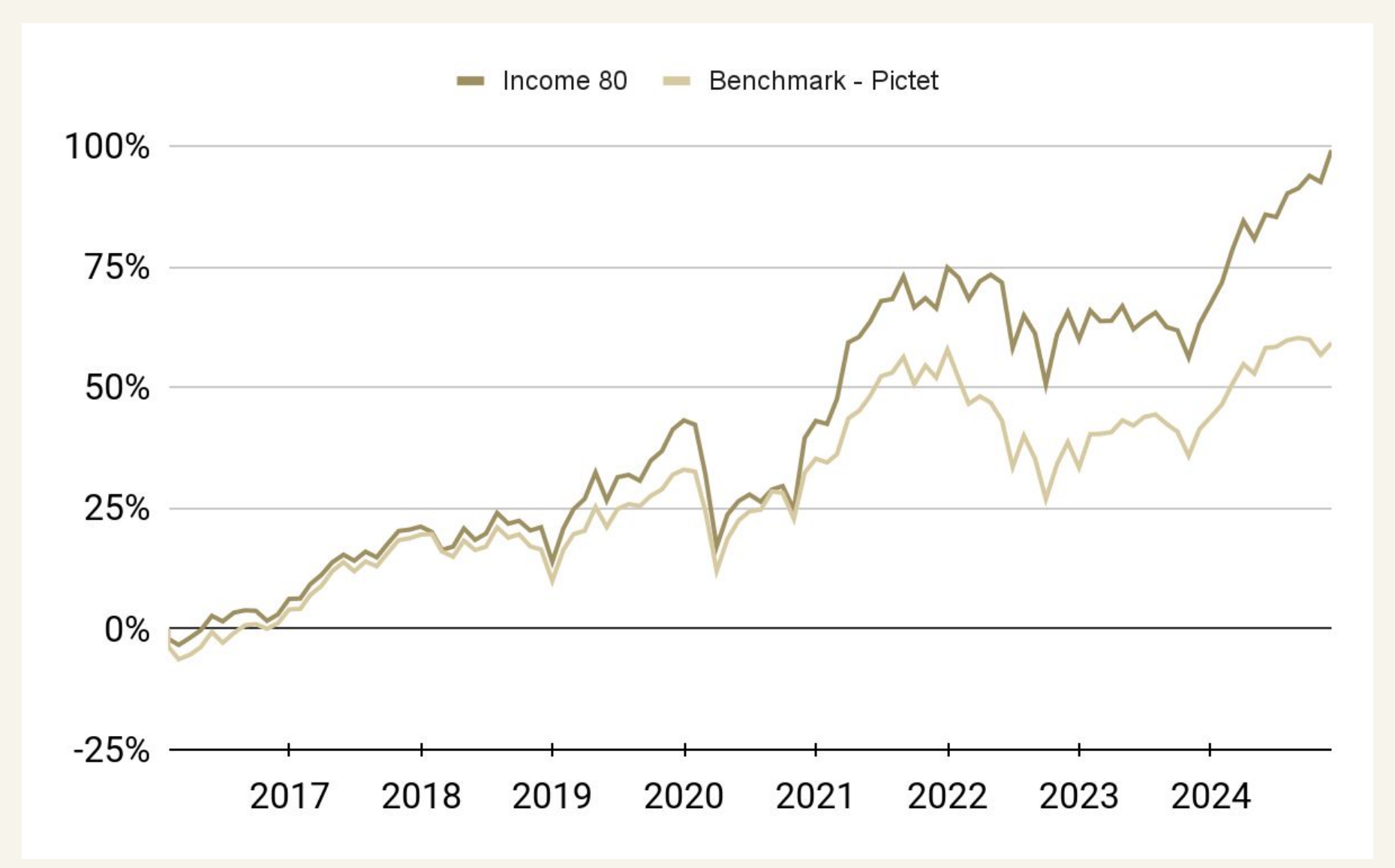
With equities, selection plays an important role. Here, the proprietary Everon approach is applied. Looking at dividend yield alone can lead to suboptimal decisions, as it takes dividend and price data into account.

Everon's approach analyzes many other criteria in addition to the dividend yield to determine which stocks offer stable, above-average and slightly growing dividends with reasonable price volatility. This ensures not only reliable income generation, but also stable portfolio value.

ASSET ALLOCATION BY RISK PROFILE



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)