

Everon Multifactor Sustainable

FEATURES

Strategy profile:	Opportunistic
Investment instruments:	Stocks, Bonds, ETFs, Funds
Strategy implementation:	Direct investments, Collective investments
Focus:	Sustainability
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. Optionally, you can set a focus on regions (CH, USA, EU) and currencies (CHF, USD, etc.).
3. 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
Sustainability 40	5.76%	10.8%	-5.0%	17.6%	4.8%	12.0%	-13.2%	6.5%	8.4%
Sustainability 60	5.4%	13.6%	-5.9%	22.6%	4.9%	17.0%	-14.6%	8.5%	10.9%
Sustainability 80	5.0%	16.2%	-6.8%	26.0%	4.8%	21.6%	-15.7%	10.6%	12.1%
Sustainability 100	4.5%	18.7%	-7.7%	28.8%	4.6%	26.1%	-16.7%	12.0%	12.5%

Annualized 2016-2024	Return p.a.	Volatility p.a.
Sustainability 40	4.9%	7.57%
Sustainability 60	6.3%	9.19%
Sustainability 80	7.4%	10.85%
Sustainability 100	8.2%	12.56%

WHAT IS EVERON MULTIFACTOR SUSTAINABLE?

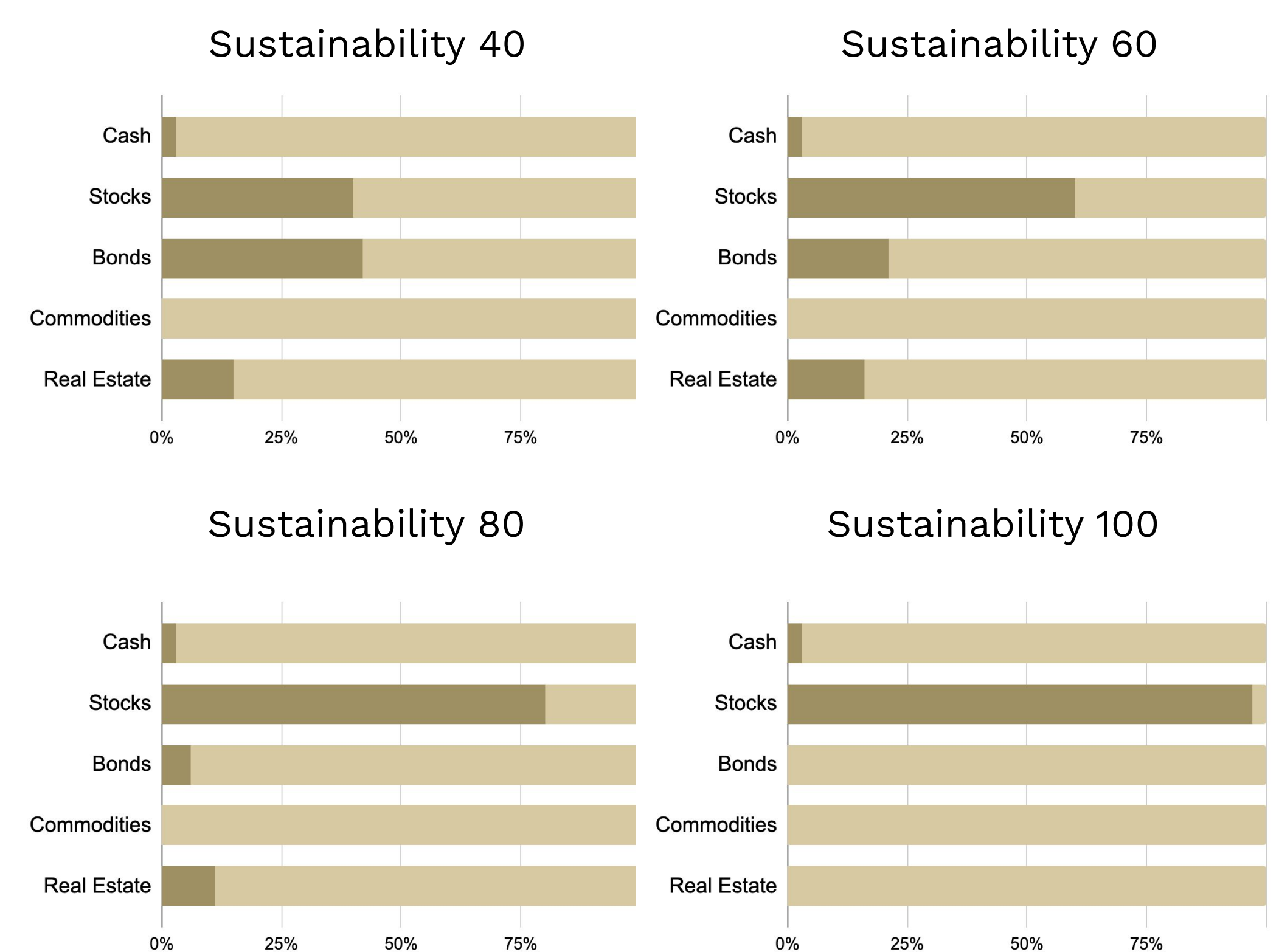
Everon Multifactor Sustainable is an investment strategy that uses a quantitative and systematic approach to select investment instruments for a portfolio. Human interaction is deliberately reduced to a necessary minimum to ensure unemotional and fact-based decisions.

The approach analyzes each instrument based on various factors to reach a holistic assessment of the attractiveness of the security. These factors include Momentum, Value, Quality, Risk and Size. This ensures that only stocks that are considered good from several perspectives are included in the portfolio.

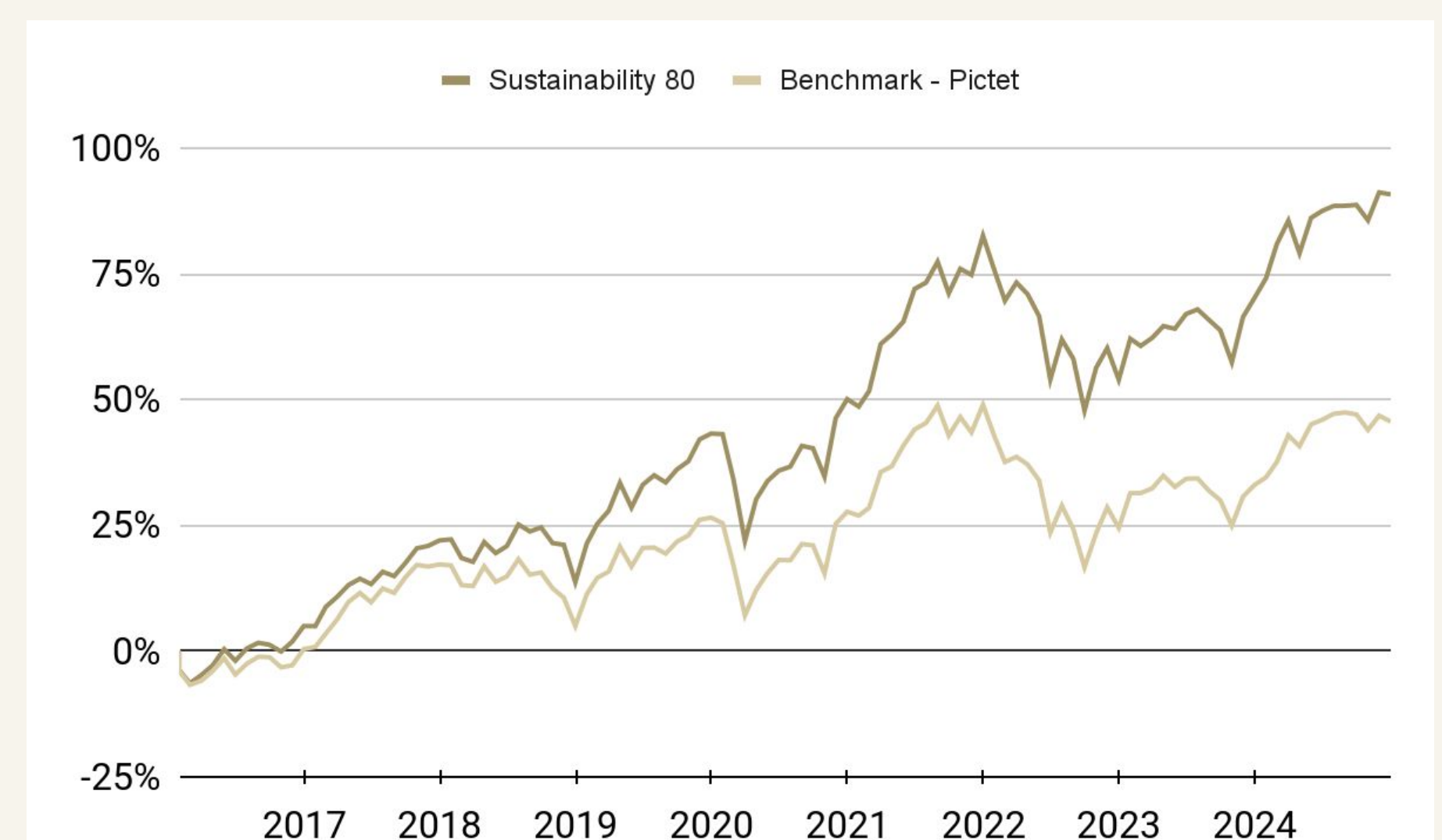
The strategy is implemented in the equity part exclusively with direct investments, while in the other asset classes collective investments such as ETFs and funds can be used.

The strategy takes a global approach with a primary focus on sustainability.

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)