everon

Everon AMC - Multi-Asset Absolute Return

FEATURES

Strategy profile:	Conservative
Investment instruments:	Futures, ETFs, Bonds and cash equivalents
Strategy implementation:	Direct investments
Focus:	Global
Minimum investment:	USD 1'000
Top-up:	minimum USD 1'000
Investment:	Weekly
ISIN:	CH1108676268

WHAT IS THE EVERON AMC - MULTI-ASSET ABSOLUTE RETURN?

The Multi-Asset Absolute Return strategy invests in a diversified basket of major asset classes, including equities, fixed income, foreign exchanges, precious metals, and commodities. Its objective is to generate absolute returns over cash while maintaining a variable correlation to the underlying asset classes.

More specifically, the strategy takes long or short positions in the various components of each asset class based on their medium to long-term performance. The strategy also includes a predefined risk allocation aimed at ensuring risk diversification at all times.

Multi-Asset Absolute Return invests in highly liquid listed financial instruments, such as futures or ETFs, and may allocate its excess cash to short-term, highly rated government bonds. This strategy is implemented within an Actively Managed Certificate (AMC).

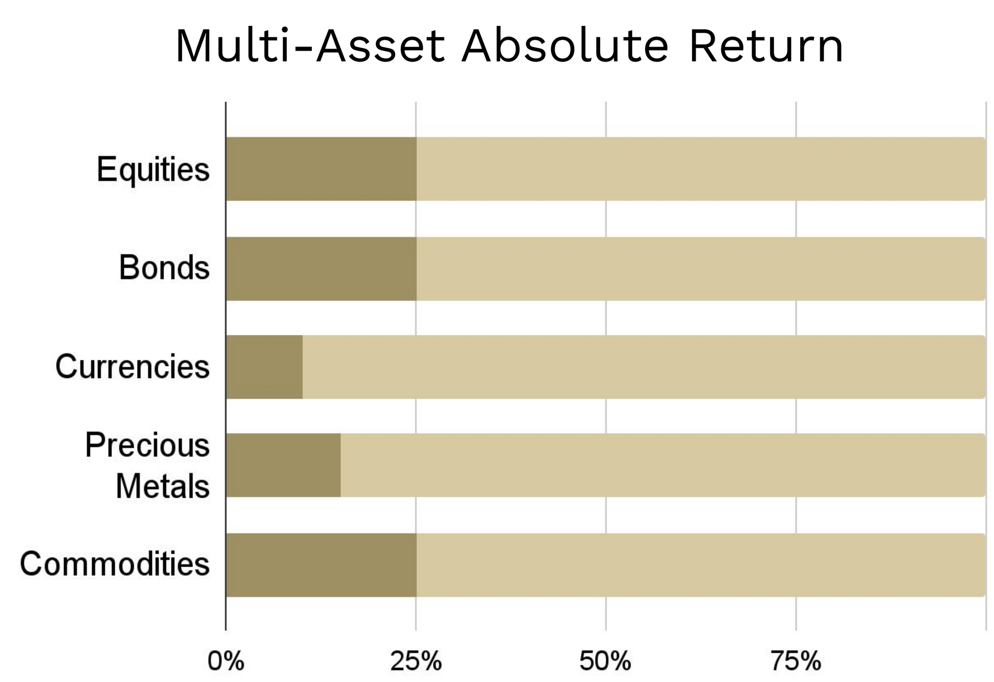
WHAT IS AN AMC?

An Actively Managed Certificate (AMC) is a financial instrument in which the underlying asset consists of a portfolio managed according to an investment strategy.

This setup allows for efficient management of a portfolio, making it accessible even for lower investment amounts.

An AMC is issued with an ISIN, thus making it a tradable security.

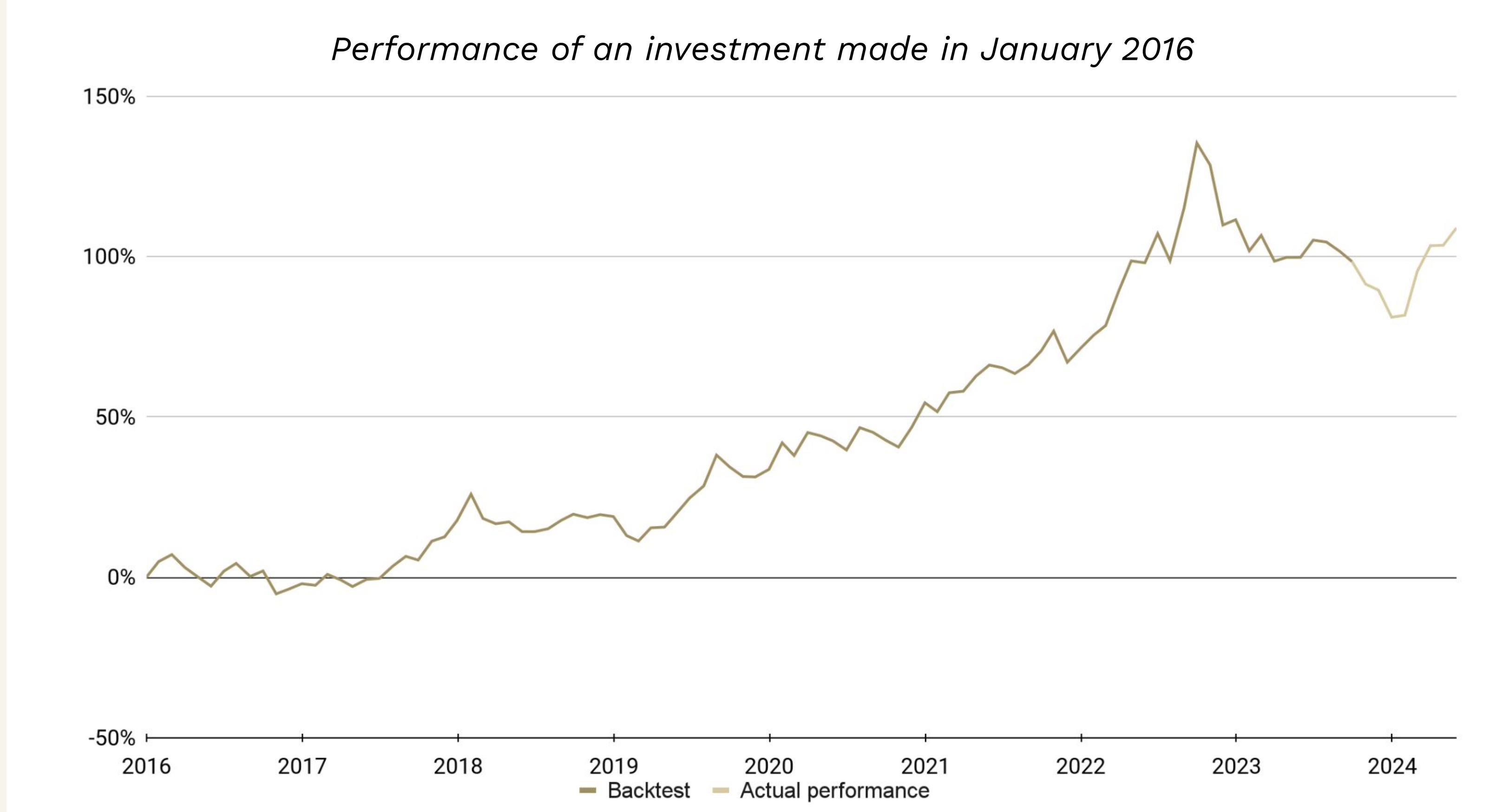
RISK ALLOCATION



PERFORMANCE

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Year
2016	4.90%	2.10%	-3.80%	-2.70%	-3.00%	4.80%	2.40%	-3.90%	1.70%	-7.00%	1.60%	1.70%	-1.99%
2017	-0.50%	3.50%	-1.70%	-2.10%	2.30%	0.30%	3.80%	3.00%	-1.10%	5.60%	1.20%	4.50%	20.08%
2018	7.00%	-6.00%	-1.40%	0.50%	-2.60%	0.00%	0.80%	2.30%	1.60%	-0.90%	0.80%	-0.50%	1.09%
2019	-5.00%	-1.50%	3.70%	0.20%	4.10%	3.60%	3.00%	7.50%	-2.70%	-2.20%	-0.10%	1.80%	12.36%
2020	6.20%	-2.80%	5.20%	-0.70%	-1.10%	-2.00%	5.00%	-1.00%	-1.70%	-1.50%	4.40%	5.20%	15.53%
2021	-1.80%	3.90%	0.30%	3.00%	2.10%	-0.50%	-1.10%	1.70%	2.60%	3.60%	-5.50%	2.60%	11.00%
2022	2.40%	1.70%	6.10%	4.90%	-0.30%	4.60%	-4.10%	8.30%	9.40%	-2.90%	-8.20%	0.80%	23.40%
2023	-4.60%	2.40%	-3.90%	0.60%	0.00%	2.70%	-0.30%	-1.40%	-1.60%	-3.54%	-0.99%	-4.45%	-14.38%
2024	0.35%	7.51%	4.11%	0.07%	2.65%								15.38%

Annualized 2001-2024	Return p.a.	Volatility p.a.
Multi-Asset Absolute Return	9.06%	12.04%



Data before the issue date (27th September 2023) represent a backtest.

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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)