

## Media release

Basel, 1 February 2018

### **Helvetia Investment Foundation on the path to success**

**The Helvetia Investment Foundation can look back on an exceptionally successful year. There was a substantial increase in assets under management, and the performance was extremely gratifying. Growth is continuing at a rapid pace this year.**

In the past business year, the Helvetia Investment Foundation increased its assets under management by 23% to CHF 809 million. The increase in volume was particularly pronounced at the Romandie Real Estate investment group: 79% to CHF 175 million. Assets at the Swiss Real Estate investment group grew by CHF 72 million to CHF 479 million.

The Swiss Shares Smart Beta Dynamic 100 strategy is also proving increasingly popular. This is thanks to the innovative and dynamic investment strategy. The over- or under-weighting vis-à-vis the SPI Index on the basis of five factors has paid off in the form of a clear additional return compared with the Swiss equities market. Since its launch in August 2015, the strategy has generated an annualized performance of 15%, while the SPI chalked up just 5.9% in increased value per year over the same period.

#### **Top places in an industry comparison**

In addition to an inflow of new money amounting to CHF 92 million, the performance of the nine investment groups also contributed to the increase in volume. In the KGAST valuation, the Swiss Shares Smart Beta Dynamic 100 and Global Shares index-linked are ranked in first place in 2017. Romandie Real Estate and BVG-Mix Plus 30 placed second last year. The Helvetia Investment Foundation was also in first place with BVG-Mix Plus 30 in a three-year comparison.

«Demand remains very buoyant this year too», comments Dunja Schwander, Managing Director of the Helvetia Investment Foundation. «A large number of well-known Swiss pension funds are among our investors.» The number of institutional investors rose by 48% to 253 in 2017.

This press release can also be found on the website [www.helvetia.ch/media](http://www.helvetia.ch/media).

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**About the Helvetia Group**

In 160 years, the Helvetia Group has grown from a number of Swiss and foreign insurance companies into a successful international insurance group. Today, Helvetia has subsidiaries in its home market Switzerland as well as in the countries that make up the Europe market area: Germany, Italy, Austria and Spain. With its Specialty Markets market area, Helvetia is also present in France and in selected regions worldwide. Some of its investment and financing activities are managed through subsidiaries and fund companies in Luxembourg and Jersey. The Group is headquartered in St.Gallen, Switzerland.

Helvetia is active in the life and non-life business, and also offers customised specialty lines and reinsurance cover. Its business activities focus on retail customers as well as small and medium-sized companies and larger corporates. With some 6,500 employees, the company provides services to more than 5 million customers. With a business volume of CHF 8.51 billion, Helvetia generated underlying earnings of CHF 491.8 million in the 2016 financial year. The registered shares of Helvetia Holding are traded on the SIX Swiss Exchange under the symbol HELN.

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