

## Media release

Basel, 23 April 2018

### Helvetia Investment Foundation: blazing new trails with Swiss mortgages

From 1 May 2018 the new Mortgages Switzerland investment group of the Helvetia Investment Foundation will be investing in Swiss mortgages. Swiss pension funds will thus be able to make indirect and broadly diversified investments – for more yield and fewer risks.

The Mortgages Switzerland investment group of the Helvetia Investment Foundation will be investing from 1 May 2018 in Swiss mortgages, which are exclusively secured against properties in Switzerland. The investment foundation will be making good use of the mortgage expertise of Helvetia and working with MoneyPark and Finovo to cover the entire mortgage value added chain together. “With the Mortgages Switzerland investment group we can bring together mortgage borrowers and investors, i.e. pension funds, simply and efficiently”, explains Dunja Schwaner, Managing Director of the Helvetia Investment Foundation.

**Positive yield for pension funds at a time of negative interest rates**  
Though the Mortgages Switzerland investment group, Swiss pension funds can make indirect and broadly diversified investments. Even in a low interest rate environment, mortgages offer attractive additional yield in comparison to CHF bonds. “With a diversified portfolio of Swiss mortgages, we intend to earn a yield after deduction of costs which exceeds that of the Swiss Bond Index”, explains Marcel Hänni, Product Manager of the Helvetia Investment Foundation. Helvetia is also the first investment foundation to offer investors the opportunity to hedge their interest rate risk from the Mortgages Switzerland investment group, temporarily or in the long term, without any major expenses.

More information about the Mortgages Switzerland investment group can be found on the website [www.helvetia-anlagestiftung.ch/en](http://www.helvetia-anlagestiftung.ch/en).

This media release can also be found on the website [www.helvetia.com/media](http://www.helvetia.com/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 6,600 employees, the company provides services to more than 5 million customers. With a business volume of CHF 8.64 billion, Helvetia generated underlying earnings of CHF 502.4 million in the 2017 financial year. The registered shares of Helvetia Holding are traded on the SIX Swiss Exchange under the symbol HELN.

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