

Zurich Blue Funds

Investments made simple



What is Zurich Blue?

No matter what your financial goals may be, selecting the right mix of investments to meet your objectives is crucial.

Investing in Zurich Blue Funds* allows you to achieve your financial goals by giving you access to a number of different asset types world-over to mitigate your investment risk.

*Available from July 2020.

Why Zurich Blue?



Your investment is **constantly monitored and refined** by a **team of Zurich experts** committed to keep your financial future in shape. The Zurich Group manages **assets worth USD 360 billion**, which means that your investment is in trusted hands.

Diversification helps reduce the impact of short-term ups and downs of different assets and provides **smoother long-term investment returns**. With this in mind, Zurich Blue invests in **multiple global assets** such as cash, bonds, equity, infrastructure funds and hedge funds.

Easy-to-understand investment solutions based on five risk levels that allow you to choose the option that **best suits your needs** and your appetite for risk. This is only available through Zurich and you can easily access fund switching and monitor your current fund value using a personal online account (ZIO).

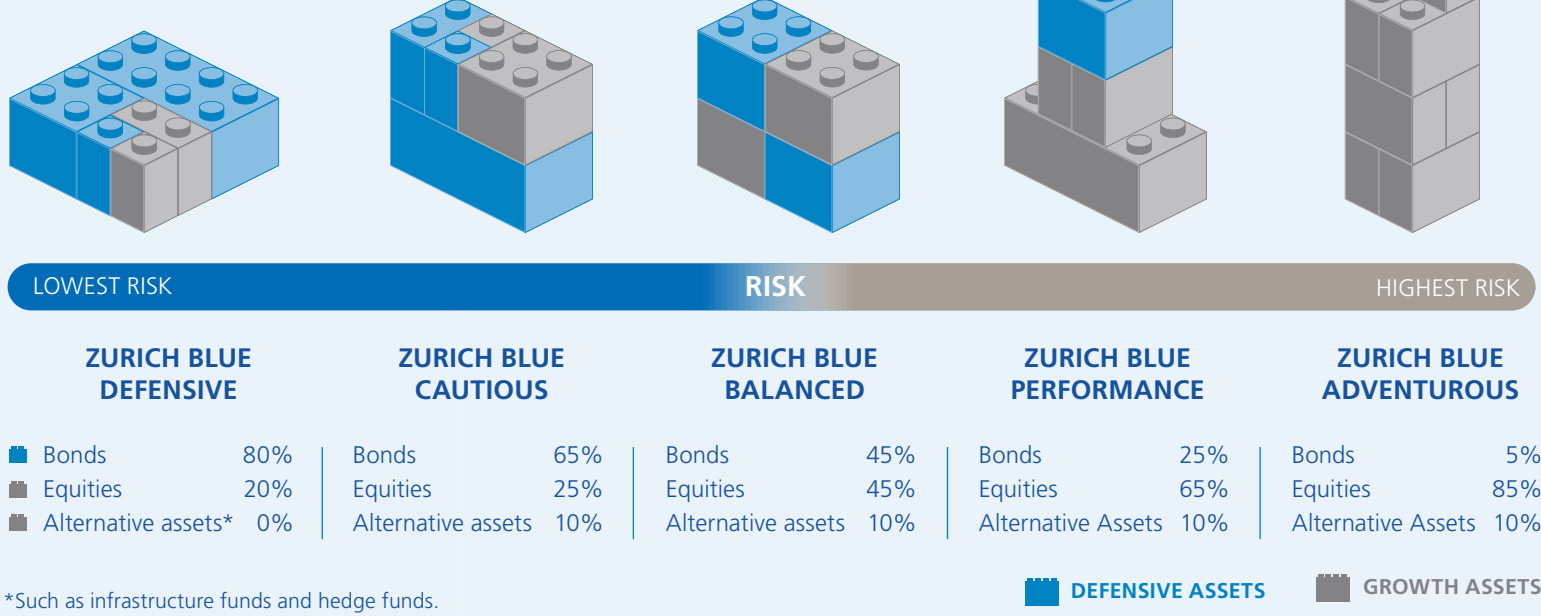
How it works?

1 Understand my risk appetite

When you invest you always take some amount of risk. It is important for you as an investor to find the right balance of risk and reward for your investment objectives. This means understanding your risk appetite. Your dedicated Zurich Adviser will guide you through this process using a specially designed risk-assessment tool.

2 Choose my funds

Based on information provided relating to your goals, the timeframe and your appetite for risk, your dedicated Zurich Adviser will help you choose the fund that's right for you.



3 Make my investment

When you invest into a Zurich Blue Fund, you are joining others like you investing in an actively managed fund.

You can follow the journey of your money below.

Your investment

Investing in a Zurich Blue Fund is an efficient way to access a number of different asset types from across the world.

Zurich Blue multi asset funds
Run by a professional portfolio manager

Your money will be invested across different assets

The portfolio manager will increase or decrease their exposure to these different asset types depending on the investment objective of the fund.

From across the world

With a Zurich Blue Fund, your money will be invested across different parts of the world. This gives you the opportunity to spread your investment risk geographically and take opportunities in developed and emerging economies.

Helping to meet your investment goals

Selecting a Zurich Blue Fund that's suitable for your needs will depend on your investment goals and the level of risk you are comfortable with. All of these factors will be discussed with your financial professional when they are making a recommendation for you.

4 Keep my plan in shape

You and your dedicated Zurich Adviser should conduct regular reviews of your investments to ensure that you continue to be on the right track. If your circumstances change or you have new investment objectives, your adviser may recommend an alternate course of action. To cater to your changing needs we have made switching your funds extremely simple.

To know more about Zurich Blue, we recommend you get financial advice. Get in touch with your dedicated Zurich Adviser to better understand which funds could be suitable for you.

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