



Trading Idea IF

# UBS Strategy Funds

23 June 2025, 14:14 UTC, written by Jon Andrea Barblan, Jonas Schneider

**Investors can build an effective portfolio with a variety of individual investments. But there is a risk that portfolio complexity can lead investors to lose sight of their overarching goals, particularly when markets become more volatile or when financial news headlines seem pressing. To tackle this, our Chief Investment Office (CIO) believes that investors should implement a “core” component in their wealth management strategy. The core should be a portfolio diversified effectively across asset classes, geographies, and sectors, and left alone to grow wealth consistently for the long term.**

One of our solutions to invest in line with our CIO House View are the **UBS Strategy Funds**. The funds offer the following characteristics:

- Broadly diversified, global investment portfolio
- Investors profit from a comprehensive investment solution that would otherwise only be possible with a discretionary mandate with a high minimum investment amount
- UBS Strategy Funds are managed with specific investment profiles, whose investments and associated risks are systematically monitored

**Risks:** Fund invests in equities, bonds of varying credit quality and money market securities on a global basis and may therefore be subject to high fluctuations in value. Fund may use derivatives which can reduce investment risk or give rise to additional risks (inter alia the counterparty risk). Value of a unit may fall below the purchase price. This requires an elevated risk tolerance and capacity. Additional information about these and other risks can be found in the prospectus and the KID document. Past performance is no indication of future results.

The above information is for marketing purposes and should not be considered as personal investment advice.

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