



# The Managed fund range

35 years of multi-asset expertise

Balanced

Performance

Dynamic

At Zurich we are proud of our track record in managing customers' investments. Our belief is that people need people to look after their money so we take a 'hands-on', active approach to investment management.

We believe that good active investment managers are best placed to deliver consistent long-term investment performance. Over the last 35 years, Zurich has been managing diversified multi-asset funds for customers throughout Ireland.

Almost

150,000  
policyholders

3  
asset classes

Equities  
Bonds  
Cash

Classified as

under the Sustainable  
Finance Disclosures  
Regulation

Well diversified  
with over

700  
holdings in each of  
the three funds

Launched in

1989  
the fund range has  
a strong track  
record

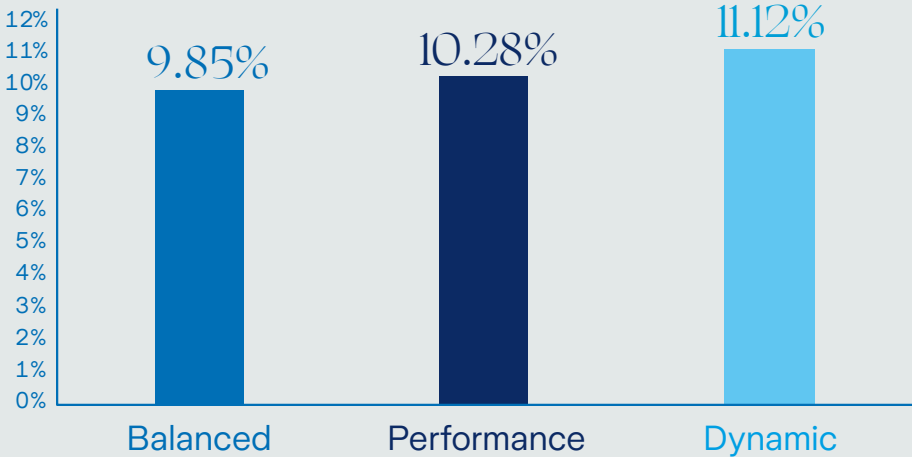
Over

€8  
billion  
invested across  
the 3 funds

Zurich Life  
Assurance plc have  
over

€40  
billion  
Assets Under  
Management

Annualised return since inception



Source: Zurich and FE fundinfo, November 2024.

Annualised performance since launch: Returns are based on offer/offer performance and do not represent the return achieved by individual policies linked to the fund with date ranges from launch 01/11/1989 to 01/11/2024. Annual management fees apply. The actual returns on policies linked to these funds will depend on the charges on the individual policies that invest and may be different than illustrated here.



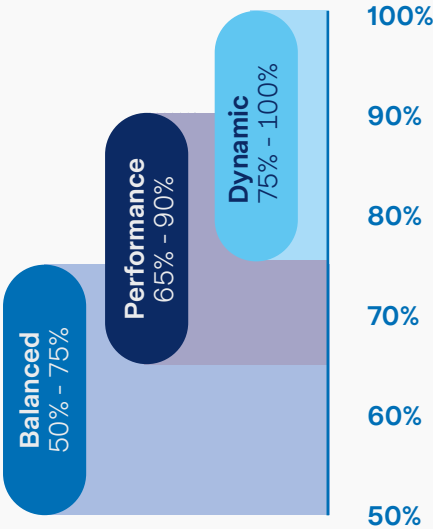
We actively navigate the markets. In good times and in bad, we have a history of making good investment decisions when it matters. Over the years we have dealt with economic booms and financial busts; making active decisions that yield long term value for our customers.”

David Warren, Chief Investment Officer

If you’d invested €30,000 in November 1989....



Equity ranges



2024  
Winner

Fund Management  
Company of the Year

Source: Business and Finance FS Awards, November 2024.

No.1

for investment  
excellence  
since 2014

Source: Brokers Ireland, November 2024.

Awarded Investment Excellence by Brokers Ireland every year from 2014 to 2024. No awards held in 2020.

Source: Zurich, November 2024. Returns are based on offer/offer performance and do not represent the return achieved by individual policies linked to the fund with date ranges from launch 01/11/1989 to 01/11/2024. Annual management fees apply. The actual returns on policies linked to these funds will depend on the charges on the individual policies that invest and may be different than illustrated here. An annual management charge of 1.50% and an allocation rate of 100% are assumed based on Zurich product profile offerings as the standard pensions product structure.

You can view all the details of your Pension, Investment or Savings online, including the current value.

**To register just visit [zurich.ie](https://zurich.ie)**

Available across the Zurich suite of Pensions, Approved Retirement Funds (ARFs), Regular Savings and Investment Bonds, investors have benefitted from the strong investment performance over the lifetime of the funds.



## For more information



**Talk** to your Financial Broker or Advisor



**Call** our Financial Planning Team on 0818 804 164



**Email** us at [customerservices@zurich.com](mailto:customerservices@zurich.com)



**Visit** our website at [zurich.ie](https://zurich.ie)

**Warning: Annual management fees apply. The fund growth shown is before the full annual management charge is applied on your policy.**

**Warning: Past performance is not a reliable guide to future performance.**

**Warning: The value of your investment may go down as well as up.**

**Warning: Benefits may be affected by changes in currency exchange rates.**

**Warning: If you invest in this fund you may lose some or all of the money you invest.**

**Warning: The income you get from this investment may go down as well as up.**

### **Zurich Life Assurance plc**

Zurich House, Frascati Road, Blackrock, Co. Dublin, A94 X9Y3, Ireland.

Telephone: 01 283 1301 Fax: 01 283 1578 Website: [www.zurich.ie](https://www.zurich.ie)

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