

Stay on course

With **UBS Manage™ [CH]**:
You set the target, we implement it.

You want to benefit from the rapid and direct implementation of your investment strategy in line with the UBS House View. You also want to benefit from investment instruments which may consider after-tax returns.

Analysis



- Systematic analysis of all relevant global financial markets
- Assessment of their risk/return prospects

Strategy



- Based on your risk tolerance, your client advisor helps you to select the right investment strategy for your goals
- You discuss your chosen investment strategy at regular intervals

Discipline



- Daily monitoring and regular rebalancing of your portfolio ensure that your mandate is consistent with your investment strategy
- We build your portfolio and take care of its daily management
- Rapid and direct implementation of the UBS House View lets you take advantage of investment opportunities
- Our systematic investment process led by experienced specialists results in discretionary mandates that often perform better than independently managed portfolios (on a risk-adjusted basis)

Key information on UBS Manage™ [CH]

Investment strategies	Income, Yield, Balanced, Growth
Reference currencies	CHF, EUR, USD
Minimum investment	CHF 50,000
Pricing models ¹	All-inclusive fees, please see separate price list
Access to a personal client advisor	Included
Access to CIO publications and information	Included
Online options	Transparency regarding positions, performance, performance and strategy commentaries by the portfolio manager
Custody account	Included
Third-party safekeeping fees	Included
Trading of securities including money-market products and foreign currencies	Included
Subscription and redemption of investment fund units	Included
Distribution fees	None
Account management in connection with the investment portfolio	Included
Statement of assets	Included
Tax statement	UK income and transaction report
UBS investment process	You benefit from: <ul style="list-style-type: none"> – Our expertise based on over 150 years of experience in the financial sector – Broad coverage of different investment markets and asset classes, as well as thematic and political analyses – Our clear and impartial UBS House View
Risks	Your portfolio is monitored in line with your individual risk profile. The value of your portfolio may fluctuate depending on market conditions, and its performance may be negative at times. All investments carry certain degree of risk.

Glossary

Investment strategy Fixed Income: The objective is to preserve assets in the long term. The return is achieved by current income from interest. Minimal volatility of asset value expected.

Investment strategy Income: The objective is to preserve assets in the long term. The return is mainly composed of current income from interest and dividends, supplemented by modest capital gains. Low volatility of asset value expected.

Investment strategy Yield: The objective is moderate appreciation of assets in the long term. The return is composed of current income from interest and dividends, supplemented by capital gains. Moderate volatility of asset value expected.

Investment strategy Balanced: The objective is appreciation of assets in the long term. The return is composed of current income from interest and dividends and capital gains. Medium volatility of asset value expected.

Investment strategy Growth: The objective is substantial appreciation of assets in the long term. The return is composed of capital gains and generally low current income from interest and dividends. Above-average volatility of asset value expected.

Investment strategy Equities: The objective is to maximize the appreciation of assets in the long term. The return is largely composed of capital gains, supplemented by minimal current income from interest and dividends. High volatility of asset value expected.

Portfolio: A collection of investments that belong to a private individual or organization. The portfolio can either be managed by the owner themselves or a professional third party.

You can find more definitions in our UBS Dictionary of Banking at ubs.com/glossary, or please ask your UBS client advisor.

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Risk information

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