

The Swiss Fund

The Swiss Fund, launched on 1 October 2026, is the only investment fund that focuses entirely on ‘real’ Swiss companies. It thus offers investors a genuine alternative. An alternative that is largely immune to the uncertainties and volatility of international politics. A key to success that has become more important today than ever before – Trump’s tariff policy and his war on Iran are a case in point.

Switzerland:

A haven of security and stability

Switzerland has been a haven of security for the wealthy from all over the world for at least as long as the end of World War I. Given the boundless destruction wrought by the war, the immense national debts, hyperinflation and political repression, it was only natural that Germans (but also many other nationalities from around the world) would want to safeguard at least part of their wealth in Switzerland – and in Swiss francs. Who could blame them?

Switzerland offered – and continues to offer – neutrality, political and economic stability, legal certainty, low taxes, a good education system, a diverse range of cultural and sporting activities and a public administration that is close to its citizens. People are also happy to rely on typically Swiss virtues such as reliability, discretion, precision, a certain slowness and, not to be underestimated: punctuality.

On 28 February 2026, debris from a downed drone crashed into Dubai’s landmark, the luxury Burj al-Arab hotel. This marked the beginning of the end for the supposedly safe haven in the Middle East, built on sand. Apparently, many investors had forgotten (or ignored) where Dubai and the like were located on the world map – close to the powder keg that is Israel/Palestine and directly opposite Iran. People were happy to recall Switzerland, the truly safe haven for investors from all over the world. Now they are happy to invest again where they feel and are safe.

Of course, not everything is perfect in Switzerland either. But it is, after all, more stable than many other places around the globe. And this relative advantage is worth a great deal. In the truest sense of the word. And the Swiss franc

may not be the biggest of all currencies, but it is clearly one of the strongest.

The Swiss Fund:

‘Genuine Switzerland’

But beware: Most Swiss companies traded on the stock exchange also operate abroad, often to a significant extent. And so they are exposed to the uncertainties of international politics, markets and exchange-rate fluctuations. All Swiss investment funds focus on such shares; this includes small- and mid-cap funds too. The Swiss Fund takes a diametrically opposed approach: It invests in Swiss companies with value creation entirely in Switzerland or, at the very least, 90%. Most companies meet the 100% requirement – all property companies and tourism firms, for example. However, there may also be good reasons why, in exceptional cases, a company with a 90 or 95% share might be included in the portfolio. An example: A long-standing client of a cantonal bank moves to France, but keeps her account and securities account in Switzerland. Her assets are therefore now included in the assets under management domiciled abroad.

The Swiss Fund contains only ‘real’ Swiss companies. They manufacture in Switzerland, they sell in Switzerland, the assets under management come from Swiss investors and in the case of property companies, 100% of the properties are located in Switzerland. This is exactly what one would actually expect from a genuine ‘Swiss Fund’ – and now, at last, that is what you get.

And – the second distinctive feature of the Swiss Fund – companies in which the fund invests must adhere to the highest standards of animal welfare and nature conservation. The Swiss Fund is thus not only the first and only invest-

ment fund to focus entirely on ‘real’ Swiss companies; it also takes animal welfare and nature conservation issues into account in its investments.

Only a few companies make it into the portfolio

Of the more than 400 securities traded in Switzerland on the SIX Swiss Exchange and the OTC-X trading platform, only 50 to 60 make it onto the Swiss Fund’s shortlist following a rigorous exclusion and inclusion process. The list becomes even shorter once the companies’ financial figures and prospects are analysed. Ultimately, after this filtering process, 30 to 40 companies remain, which the Swiss Fund includes in its portfolio. This also ensures optimal diversification at all times.

The fund for Switzerland

By purchasing units in the Swiss Fund, investors are also supporting the Swiss economy:

- The Swiss Fund promotes value creation in Switzerland
- The money flows into the Swiss economy
- It strengthens the manufacturing sector and the financial centre
- It safeguards jobs and training places in Switzerland
- Know-how and experience remain in Switzerland

The Swiss Fund: A fund that truly lives up to its name.