



AlphaCapita (Switzerland) SA

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AlphaCapita (Switzerland) SA Global Balanced Portfolio

Investment Area:
Global

Risk Profile:
Moderate

Allocation:
Up to 50% in Fixed Income and up
To 50% in share based instruments.

Recommended investment horizon:
3-5 years

Management Fees:
Please refer to current rates and
conditions

Expected returns:
Between 5% - 8%

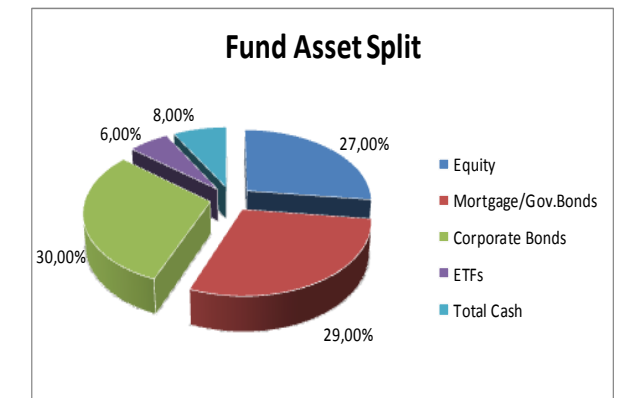
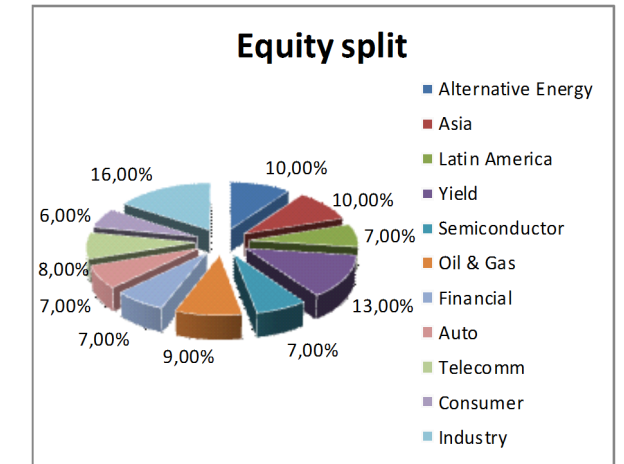
- Asset Allocation focused
- Geographical diversification
- Hedged
- Buy & hold
- Allocation split 50% Fixed Income 50% Blue chip stocks

INVESTMENT PROFILE

This Portfolio emphasises on higher capital growth and rising income potential with a secondary goal of providing a modest income over the long term. We have chosen graded bonds for current income and complimented them by using high quality blue chip company stocks for capital growth and rising income. Over the long term this portfolio is designed to have a higher risk than income oriented investments.

Although past performance is not a guarantee of future results, the investments chosen have the potential to out perform income or growth and income investments. The stocks and bonds employed in this Portfolio are selected for their rapid earnings growth to deliver their long term returns. The prices of these securities will usually vary more on a day to day basis than prices of income investments and income and growth stocks or income and growth mutual funds.

Performance				
Year	Q1	Q2	Q3	YDT
2009	-2.70%	2.47%	8.79%	17.0%
2010	6.10%	0.24%	2.58%	7.81%
2011	0.24%	-5.45%	-14.41%	-9.38%



DISCLAIMER

The information contained in this material is part of an informational service and does not take the readers' investment intentions or financial capabilities into account. Investments in Managed funds can be very speculative and investors can incur losses as well as profits. Investments in Managed funds is not suitable for the general public wherefore only risk-capital should be employed in these types of investments. This material does not take any readers' particular investment goal or financial situation into account. You should carefully consider your financial situation and confer with your financial advisor before taking part in any type of transaction.

