

# Handelsbanken Pension 60 Aktiv

The fund is most appropriate for investors born in the 1960s. The fund invests in Nordic and global equity funds, as well as Swedish fixed income funds. The objective of the fund is to achieve good returns, while gradually reducing risk up to the time of retirement. We decrease the proportion of equities and gradually increase the proportion of interest-bearing securities until the retirement age. The fund invests primarily in funds within Handelsbanken as well as in fund that are managed by other fund management companies. Refer to Portfolio distribution at [www.handelsbanken.se/funds](http://www.handelsbanken.se/funds) for the current distribution. The fund is reported as an Article 8 fund pursuant to EU regulation 2019/2088 on sustainability-related disclosures in the financial services sector (SFDR).

## Performance

17.05.2024

| YTD    | 1 week | 1 mth. | 3 mån | 1 year | 5 years | 10 years |
|--------|--------|--------|-------|--------|---------|----------|
| 11.54% | 1.21%  | 4.21%  | 7.65% | 16.19% | 55.09%  | 176.14%  |

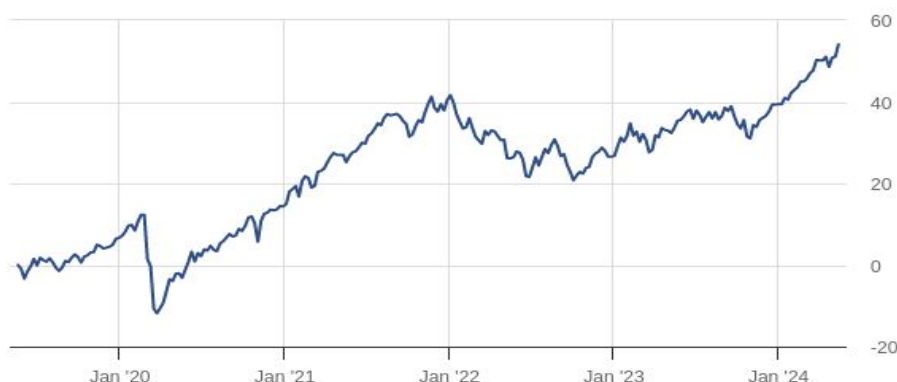
## Average performance

| Average. perf.     | 2 years | 3 years | 5 years | 10 years |
|--------------------|---------|---------|---------|----------|
| Fund <sup>1</sup>  | 8.07%   | 6.04%   | 8.33%   | 10.55%   |
| Index <sup>2</sup> | 10.45%  | 8.31%   | 9.97%   | 11.23%   |

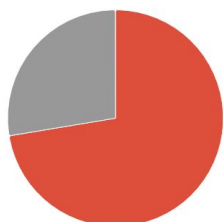
<sup>1</sup> Calculated on the fund's monthly closing price

<sup>2</sup> Benchmark index: OMRX Treasury Bill Index (16,875%), HMNI Swe All Government Dur Const 6Y (11,8125%), HMNI Swe All Mortgage Dur Const 2.5Y (5,0625%), Solactive ISS ESG Screened Paris Aligned Global Markets Index NTR (33,125%), Solactive ISS ESG Screened Paris Aligned Nordic Index NTR (33,125%). The information in the table refers to the benchmark index valid at any given time. In the event the fund has previously had other benchmark indexes, this information can be found in the fund's annual report.

## Five years performance



## Portfolio



Stocks 72.40%  
Bonds and Cash 27.60%

As of: 30.04.2024



Sweden 37.08%  
United States 22.73%  
Denmark 13.81%  
Finland 4.75%  
Norway 4.36%  
United Kingdom 2.56%  
Germany 1.61%  
Japan 1.56%  
France 1.31%  
Other 10.24%

As of: 30.04.2024

The positive performance in the equity markets continued during March due to stronger than expected economic data. As a result of lower concerns about inflation, the market deems that the interest rate peak has been reached and the central banks are now expected to cut key rates before the summer. The Swedish krona weakened during the month, which contributed positively to the returns on foreign investments and also to

## Fund manager



## Allokeringsgruppen

Responsible: Johann Guggi

|                    |                     |
|--------------------|---------------------|
| Main category      |                     |
| Risk               | 3                   |
| Rate               | 403.83 (17.05.2024) |
| Reporting Currency | SEK                 |
| Price/Trade        | Daily               |
| Total Rating™      | ★★★★                |

|                        |       |
|------------------------|-------|
| Minimum investment     | 0 SEK |
| Monthly savings        | 0 SEK |
| Traded on the Internet | No    |
| Management Fee         | 1.25% |
| Entry charge           | 0%    |
| Exit charge            | 0%    |

|                             |                         |
|-----------------------------|-------------------------|
| Fund assets                 | 12,365 MSEK             |
| Distribution per fund unit  | -                       |
| Distribution date           | -                       |
| Fund, date of launch        | 12.09.2014 <sup>1</sup> |
| Share class, date of launch | 12.09.2014              |

<sup>1</sup> Fondens kurshistorik före startdatum härleds från fusionen (12 september 2014) då Placeringsfonden Handelsbanken Pension 60 Aktiv (Finland) lades samman med Handelsbanken Pension 60 Aktiv (Sverige). Placeringsinriktningen är efter fusionen oförändrad och Handelsbanken Fonder AB (Sverige) är fortsatt förvaltare efter fondernas fusion.

## Largest holdings

|  |        |
|--|--------|
| Handelsbanken Norden Ind Crit (A1 SEK)   | 15.79% |
| Handelsbanken Dev Markets Ind Cri A1 SEK | 7.26%  |
| Handelsbanken Räntestrategi A1 SEK       | 5.92%  |
| XACT Norden                              | 5.91%  |
| Handelsbanken Nordiska Småbol (A1 SEK)   | 5.82%  |
| Handelsbanken Norden Selektiv (A1 SEK)   | 5.00%  |
| Handelsbanken Ftgobl Inv Gr A1 SEK       | 4.23%  |
| Omxesg4e                                 | 4.05%  |
| Handelsbanken Långränta (A1 SEK)         | 3.85%  |
| Handelsbanken Global Index Crit (A1 SEK) | 3.59%  |

emerging market bonds, which performed strongly

The fixed income market had relatively small fluctuations in both long and short-term interest rates during the month. We expect a widescale decline to inflation and the start to rate cuts by the central banks, which should lead to a soft landing in economic activity. In this environment, corporate profits should also gain momentum and we believe there are favorable conditions for equity markets to continue to rise. Consequently, we increased the proportion of equities further and are retaining an overweight in equities in our portfolios.

Within the equity holdings we prefer high-quality companies, i.e., companies with stable cash flows and strong balance sheets, as well as an overweight in small caps that benefit from lower interest rates and an improving economy.

The fund's fixed income holdings have a neutral duration and we prefer corporate bonds and emerging market bonds. We also have a position for a strengthening in the SEK.

As of: 26.04.2024

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Historical yields are not a guarantee of future returns. A fund can both increase and decrease in value and it is not guaranteed that you will recover the entire invested amount. Note that a fund with risk level 5-7, as stated in the fund's fact sheet (KID), can vary greatly in value due to the fund's composition and management methodology. The prospectus, fund rules and KID are available under each fund. [Summary of investors' rights](#).

The fund's fact sheet, risk level, fund rules and prospectus are available at [www.handelsbanken.se/funds](http://www.handelsbanken.se/funds). Handelsbanken does not assume liability for any errors in the information.

[www.handelsbanken.se/funds](http://www.handelsbanken.se/funds)

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