

Handelsbanken Pension 80 Aktiv

The fund is an actively managed and is most appropriate for investors born in the 1980s. 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 funds that are managed by other fund management companies. Refer to Portfolio distribution at www.handelsbanken.se/funds for the current distribution. For this fund, the fund company's Enhanced exclusion level applies. For information about sectors that the fund excludes, see the Detailed information tab. 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

21.11.2024

YTD	1 week	1 mth.	3 mån	1 year	5 years	10 years
16.81%	-1.29%	-1.63%	1.21%	20.59%	65.55%	190.02%

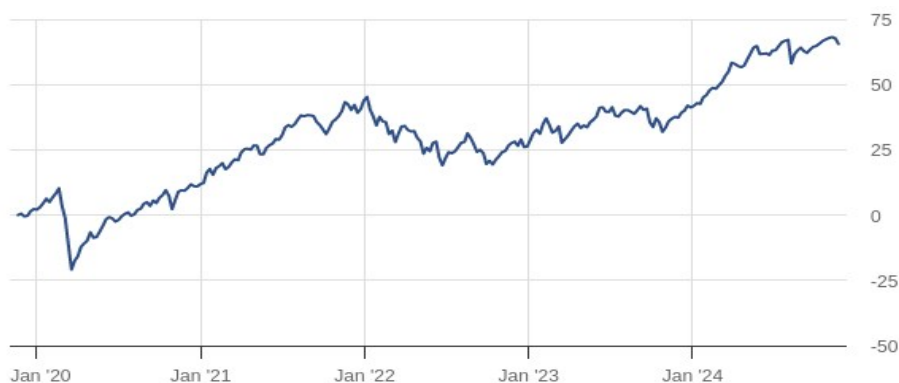
Average performance

Average perf.	2 years	3 years	5 years	10 years
Fund ¹	15.68%	6.58%	10.93%	11.25%
Index ²	19.65%	9.96%	13.38%	12.66%

¹ Calculated on the fund's monthly closing price

² Benchmark index: SIX SRI Nordic 200 Net Index (37,5%), Solactive ISS ESG Screened Paris Aligned Nordic Index NTR (12,5%), Solactive ISS ESG Screened Paris Aligned Global Markets Index NTR (50%). 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 99.40%
Bonds and Cash 0.60%

As of: 31.10.2024

United States	31.33%
Sweden	26.74%
Denmark	13.40%
Finland	5.60%
Norway	3.87%
United Kingdom	3.65%
Japan	2.33%
Switzerland	1.62%
Germany	1.49%
Other	9.98%

As of: 31.10.2024

The equity market rebounded in September following a weak start to the month. Emerging markets posted the strongest performance, particularly the Chinese markets which rose sharply after China announced interest rate cuts and stimulus measures. Performance in the Swedish equity market was also positive, with real estate investments posting strength. In contrast, the other Nordic stock markets posted negative performance, largely due to the weak performance

Fund manager



Allokeringsgruppen

Responsible: Pär Sjögemark

Main category	
Risk	4
Rate	467.13 (21.11.2024)
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	5,052 MSEK
Distribution per fund unit	-
Distribution date	-
Fund, date of launch	12.09.2014 ¹
Share class, date of launch	12.09.2014

¹ Fondens kurshistorik före startdatum härleds från fusionen (12 september 2014) då Placeringsfonden Handelsbanken Pension 80 Aktiv (Finland) lades samman med Handelsbanken Pension 80 Aktiv (Sverige). Placeringsriktningen är efter fusionen oförändrad och Handelsbanken Fonder AB (Sverige) är fortsatt förvaltare efter fondernas fusion.

Largest holdings

Handelsbanken Norden Index (A1 SEK)	18.97%
Handelsbanken Develop M. Index (A1 SEK)	10.23%
Handelsbanken Nordiska Småb (A1 SEK)	9.99%
JPM Glb Rsh Enh Idx EqPrsAlgndS1(acc)SEK	9.99%
XACT Norden	9.50%
Handelsbanken Norden Selektiv (A1 SEK)	7.56%
Handelsbanken Global Digital (A1 SEK)	3.73%
JPM Europe Sus Sm Cp Eq S2 Acc EUR	3.68%
Handelsbanken Global Tema (A1 SEK)	2.60%
Handelsbanken Amerika Små Tema (A1 SEK)	2.56%

of Danish Novo Nordisk during the month.

The US central bank lowered its rate by 0.5% to stimulate growth in the domestic economy. As expected, the Swedish Riksbank lowered the repo rate by 0.25% and the market is expecting at least two additional cuts during the year. Both the US and the Swedish central banks believe that the risk for inflation is under control, which opens the door for several rate cuts.

We are maintaining our positive outlook on risk assets and expect the inflation rate to continue to decline and that economic growth will gain momentum. In this climate we also expect to see higher corporate earnings. As a result, we believe there are good conditions for a further rise in the equity markets and therefore remain overweight in equities relative to fixed income investments. We see the strongest potential in high-quality companies, small caps, digitalization, healthcare and real estate.

As of: 16.10.2024

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. Handelsbanken does not assume liability for any errors in the information.

www.handelsbanken.se/funds

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