

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 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

22.07.2024

YTD	1 week	1 mth.	3 mån	1 year	5 years	10 years
12.71%	-0.63%	2.28%	5.68%	15.56%	55.74%	165.66%

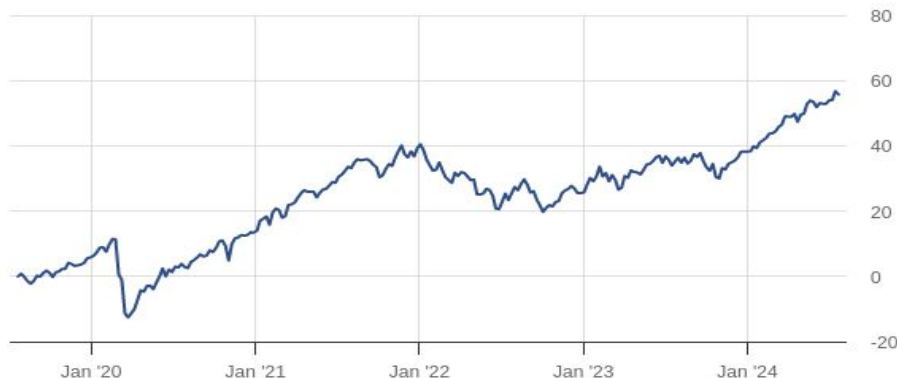
Average performance

Average perf.	2 years	3 years	5 years	10 years
Fund ¹	12.31%	5.81%	9.15%	10.22%
Index ²	15.05%	7.98%	10.81%	10.94%

¹ Calculated on the fund's monthly closing price

² Benchmark index: SIX SRI Nordic 200 Net Index (24,84375%), Solactive ISS ESG Screened Paris Aligned Nordic Index NTR (8,28125%), Solactive ISS ESG Screened Paris Aligned Global Markets Index NTR (33,125%), HMNI Swe All Mortgage Dur Const 2.5Y (5,0625%), OMRX Treasury Bill Index (16,875%), HMNI Swe All Government Dur Const 6Y (11,8125%). 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 70.40%
Bonds and Cash 29.60%

As of: 30.06.2024

Sweden 36.24%
United States 24.79%
Denmark 12.87%
Finland 4.65%
Norway 4.16%
United Kingdom 3.13%
Germany 2.65%
Japan 1.60%
Netherlands 1.47%
Other 8.45%

As of: 30.06.2024

The month of June was positive for the global equity markets and the World Index rose just 3% in SEK. A weaker SEK benefited the returns on foreign holdings. The US equity markets posted the strongest performance, driven by the major US technology companies. Emerging markets also posted strength in the period. In contrast, the stock markets in Sweden and Europe

Fund manager



Allokeringsgruppen

Responsible: Johann Guggi

Main category
Risk 3
Rate 408.06 (22.07.2024)
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 12,589 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 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) 15.37%
Handelsbanken Dev Markets Ind Cri A1 SEK 7.43%
JPM Glb Rsh Enh Idx EqPrsAlgnS1(acc)SEK 6.82%
Handelsbanken Räntestrategi A1 SEK 5.88%
Handelsbanken Långränta (A1 SEK) 5.76%
XACT Norden 5.75%
Handelsbanken Nordiska Småbol (A1 SEK) 5.66%
Handelsbanken Norden Selektiv (A1 SEK) 4.94%
Handelsbanken Ftgobl Inv Gr A1 SEK 4.20%
Omxesg4g 2.93%

lagged. The Swedish market rates fell in June, which led bond funds to outperform fixed income funds with shorter duration. The market continued to focus on inflation data and the actions of the central banks. As expected, the European Central Bank cut interest rates at the beginning of June. The upcoming elections in France, UK and US have periodically affected the financial markets.

We increased the fund's holdings in Handelsbanken Global Digital and Handelsbanken Hälsovård Tema. We also added a new global equity fund, JPMorgan Global Research Enhanced Index Fund, whose strategy is based on Handelsbanken's sustainability framework. We decreased the exposure to US small caps and made a corresponding increase in European small caps where we currently see greater potential.

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. Within the fixed income holdings we prefer corporate bonds as we believe these offer attractive yields. Within the fixed income holdings we prefer corporate bonds as we believe these offer attractive yields. 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. Within the fixed income holdings we prefer corporate bonds as we believe these offer attractive yields. Within the fixed income holdings we prefer corporate bonds as we believe these offer attractive yields. 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. Within the fixed income holdings we prefer corporate bonds as we believe these offer attractive yields. Within the fixed income holdings we prefer corporate bonds as we believe these offer attractive yields. 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. Within the fixed income holdings we prefer corporate bonds as we believe these offer attractive yields.

As of: 11.07.2024

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

Handelsbanken