

# Handelsbanken Auto 25 Criteria

The fund is a rules-based mixed fund and invests 25% in the equity market and the remainder in the fixed income market. The fund invests a minimum of 90% of its assets in mutual funds within Handelsbanken. 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

03.07.2024

YTD	1 week	1 mth.	3 mån	1 year	5 years	10 years
4.57%	0.02%	0.75%	1.68%	7.95%	16.08%	-

## Average performance

Average. perf.	2 years	3 years	5 years	10 years
Fund <sup>1</sup>	5.00%	2.53%	3.19%	-
Index <sup>2</sup>	5.30%	2.91%	-	-

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

<sup>2</sup> Benchmark index: Solactive ISS ESG Screened Paris Aligned Nordic Index NTR (10%), OMRX Treasury Bill Index (28,125%), SHB Nordic High Div Low Vol (2,5%), Solactive ISS ESG Screened Paris Aligned Developed Markets Small Cap Index NTR (2,5%), OMRX Mortgage Bond 1-3 y Index (9,375%), Solactive ISS ESG Screened Paris Aligned Global Markets Index NTR (10%), Handelsbanken Sweden All Bond Tradable Index (37,5%). 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 24.92%  
Bonds and Cash 75.08%

As of: 30.06.2024

Sweden 73.80%  
United States 8.37%  
Denmark 5.29%  
Finland 3.06%  
Norway 2.62%  
Other 6.86%

As of: 31.05.2024

## Fund manager



### Anders Dolata

Experience in the fund industry 1994.  
Portfolio Manager since 7 June 2018.

Main category	Mixed Fund
Risk	2
Rate	118.88 (03.07.2024)
Reporting Currency	SEK
Price/Trade	Daily
Total Rating™	★★★
Minimum investment	0 SEK
Monthly savings	0 SEK
Traded on the Internet	No
Management Fee	0.6%
Entry charge	0%
Exit charge	0%
Fund assets	1,497 MSEK
Distribution per fund unit	-
Distribution date	-
Fund, date of launch	07.06.2018
Share class, date of launch	07.06.2018

## Largest holdings

XACT Obligation ETF	37.52%
Handelsbanken Kortrån SEK (A1 SEK)	37.49%
Handelsbanken Norden Ind Crit (A1 SEK)	10.04%
Handelsbanken Global Index Crit (A1 SEK)	9.91%
Handelsbanken GI Småbolag Ind Cri A1 SEK	2.49%
XACT Nordic High Div Low Vol ETF	2.49%

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)

**Handelsbanken**