

# Handelsbanken Auto 75 Criteria

The fund is a rules-based mixed fund and invests 75% 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

22.07.2024

YTD	1 week	1 mth.	3 mån	1 year	5 years	10 years
13.59%	-0.45%	2.52%	5.78%	17.64%	58.08%	-

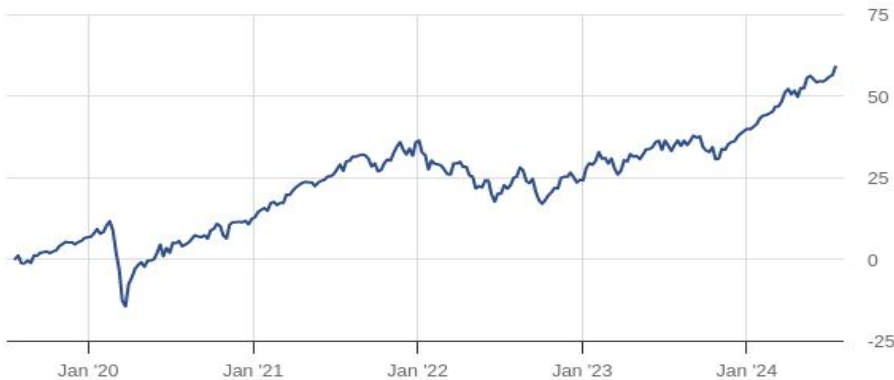
## Average performance

Average perf.	2 years	3 years	5 years	10 years
Fund <sup>1</sup>	14.49%	7.15%	9.43%	-
Index <sup>2</sup>	14.83%	7.54%	-	-

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

<sup>2</sup> Benchmark index: OMRX Mortgage Bond 1-3 y Index (3,125%), Solactive ISS ESG Screened Paris Aligned Developed Markets Small Cap Index NTR (7,5%), Solactive ISS ESG Screened Paris Aligned Global Markets Index NTR (30%), Solactive ISS ESG Screened Paris Aligned Nordic Index NTR (30%), SHB Nordic High Div Low Vol (7,5%), OMRX Treasury Bill Index (9,375%), Handelsbanken Sweden All Bond Tradable Index (12,5%). 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	74.84%
Bonds and Cash	25.16%

As of: 30.06.2024

Sweden	38.45%
United States	24.42%
Denmark	12.18%
Finland	5.60%
Norway	4.43%
Japan	2.29%
United Kingdom	1.70%
China	1.47%
Switzerland	1.38%
Other	8.09%

As of: 30.06.2024

## Fund manager



### Anders Dolata

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

Main category	Mixed Fund
Risk	3
Rate	168.66 (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	0.6%
Entry charge	0%
Exit charge	0%
Fund assets	3,519 MSEK
Distribution per fund unit	-
Distribution date	-
Fund, date of launch	07.06.2018
Share class, date of launch	07.06.2018

## Largest holdings

Handelsbanken Norden Ind Crit (A1 SEK)	30.10%
Handelsbanken Global Index Crit (A1 SEK)	30.02%
XACT Obligation ETF	12.49%
Handelsbanken Korträn SEK (A1 SEK)	12.41%
Handelsbanken Global Småb Index (A1 SEK)	7.53%
XACT Nordic High Div Low Vol ETF	7.42%

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**