

Handelsbanken Pension 80 - Pension & Försäkring

The fund is primarily intended for investors born in the 1980s. The fund is suitable for pension savings, which means that as you age, the fund investments become safer by gradually switching investments from the equity market to the fixed income market. 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
16.12%	0.30%	1.53%	3.20%	18.48%	89.33%	213.92%

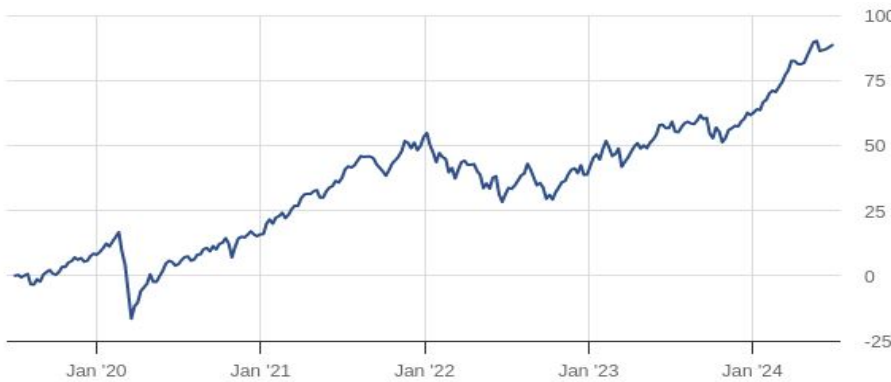
Average performance

Average. perf.	2 years	3 years	5 years	10 years
Fund ¹	16.22%	11.78%	14.57%	12.11%
Index ²	16.15%	11.46%	14.64%	12.79%

¹ Calculated on the fund's monthly closing price

² Benchmark index: Solactive ISS ESG Screened Paris Aligned Global Markets Index NTR (50%), Solactive ISS ESG Screened Paris Aligned Nordic 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 99.80%
Bonds and Cash 0.20%

As of: 30.06.2024

United States 30.78%
Sweden 22.85%
Denmark 19.92%
Finland 5.02%
Japan 2.95%
United Kingdom 2.67%
Norway 1.83%
China 1.82%
Switzerland 1.79%
Other 10.37%

As of: 31.05.2024

Fund manager



Anders Dolata

Experience in the fund industry 1994.
Portfolio Manager since 1 April 2020.

Main category

Risk 4
Rate 430.95 (03.07.2024)
Reporting Currency SEK
Price/Trade Daily
Total Rating™ ★★★★★

Minimum investment 0 SEK
Monthly savings -
Traded on the Internet No
Management Fee 0.35%
Entry charge 0%
Exit charge 0%

Fund assets 15,406 MSEK
Distribution per fund unit -
Distribution date -
Fund, date of launch 19.10.2018
Share class, date of launch 19.10.2018

Largest holdings

Handelsbanken Norden Ind Crit (A1 SEK) 20.04%
XACT Norden 19.85%
Handelsbanken Dev Markets Ind Cri A1 SEK 19.71%
Handelsbanken Global Index Crit (A1 SEK) 19.69%
XACT OMXC25 ESG A1 DKK 5.22%
Handelsbanken Sverige Index Crit A1 SEK 5.19%
Handelsbanken GI Småbolag Ind Cri A1 SEK 4.73%
Handelsbanken EM Index (A1 SEK) 3.68%
Handelsbanken USA Ind Crit A1 SEK 1.62%
Handelsbanken Europa Index Crit (A1 SEK) 0.17%

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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