The Zurich Horizon funds are five actively managed, risk profiled, multi-asset funds designed to maximise returns for a given level of risk.

The funds combine the eValue optimised strategic asset allocations with active fund management from Threadneedle Asset Management Limited (Columbia Threadneedle).

The Zurich Horizon Multi-Asset Funds I – V launched on 27.03.2015. Before that date the Threadneedle Multi-Asset Zurich I – V funds were available as the Horizon fund range.

Both sets of funds are managed by Threadneedle, follow the same investment strategy, map to the same eValue risk profiles and invest in the same range of underlying Threadneedle funds.

The information shown here is simulated performance for the Zurich Horizon Multi-Asset Funds based on the performance of the Threadneedle Multi-Asset Zurich funds and the Zurich Horizon Multi-Asset funds.

FE is one of the world’s leading providers of investment fund data and analysis and is a dominant supplier of fund data in the UK. FE Crown Fund Ratings enable investors to distinguish between funds that are strongly outperforming their benchmark and those that are not. The top 10% of funds will be awarded five FE Crowns, the next 15% receiving four Crowns and each of the remaining three quartiles will be given three, two and one Crown respectively. FE Crown Fund Ratings do not constitute investment advice offered by FE and should not be used as the sole basis for making any investment decision. All rights reserved.

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Please note that figures refer to simulated performance and past performance is not a reliable guide to future performance. The value of the funds can fall, meaning your clients may get back less than they originally invested. Changes in exchange rates will affect the value of investments made overseas. Investments in newer markets, smaller companies or single sectors offer the possibility of higher returns but may also involve a higher degree of risk. Assets invested in property can sometimes take a longer period to release than bonds or equities.
We have compared the simulated fund performance of the Zurich Horizon Multi-Asset Funds with the actual performance of three competitor funds which also follow an actively managed multi-asset risk-based investment approach. There are alternative funds available and the inclusion of a fund for comparison purposes does not indicate that the funds are equivalent.

For more information about the Zurich Horizon Fund Range please speak to your Business Account Manager or call 08085 546 546.
We may record or monitor calls to improve our service.

Data provided by FE as at 30.09.2019. Illustrations based on sterling platform share classes as detailed in the graphs above; bid to bid net of all charges, with net income reinvested. The Zurich Horizon Multi-Asset Funds I – V were launched on 27.03.2015, performance of the Horizon funds before then is based on the Threadneedle Multi-Asset Zurich Funds I – V.

The above information is a guide intended for financial advisers only.

If you require further information on any of the Zurich Horizon Multi-Asset Funds, the Key Investor Information Document (KIID) and the prospectus are both available on the website www.zurichhorizon.co.uk. The KIID is designed to help investors make an informed decision before investing.

The authorised Corporate Director of the Zurich Investment Funds ICVC is Zurich Investment Services (UK) Limited, which is authorised and regulated by the Financial Conduct Authority.

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