

# CSX Invest. Invest in three easy steps.



## CSX Invest in short

CSX Invest is the digital solution for simple investing via smartphone that allows you to receive advice and invest, starting at just CHF 100. You always have full control of your investment, meaning you can:

- Keep track of the evolution of your returns.
- Increase your investments at your convenience.
- Withdraw money whenever you need it.

Thanks to our transparent pricing, you also don't need to worry about any hidden fees. Available for Credit Suisse clients in Switzerland over the age of 18.

## Take advantage of our expertise

In times of low interest rates, it's worth searching for alternatives to a savings account. Would you like to participate in high-quality investments with little fuss? Then let our experienced investment professionals manage your money. All it takes is a few minutes to generate your investment strategy, which factors in your financial situation as well as your risk tolerance. This makes it easy for you to participate in the financial markets with no expert knowledge.

## Benefit from the advantages



Start investing with as little as CHF 100.



Easy to exit or change products.



Sustainable, high-quality investment funds.



Client service with real people.

## Invest sustainably

CSX Invest offers you a carefully selected range of broadly diversified top-rate funds that are all actively managed. Every CSX Invest fund fulfills the criteria set by the Credit Suisse Sustainable Investment Framework, meaning whatever fund you select, it's always sustainable.

## Reach your optimal investment in three easy steps

Access the CSX Invest function via the Credit Suisse – CSX app.

# 1.

Answer a few questions about your financial situation, risk appetite, and time horizon.

# 2.

Review our recommended investment strategy and decide whether you wish to adjust it.

# 3.

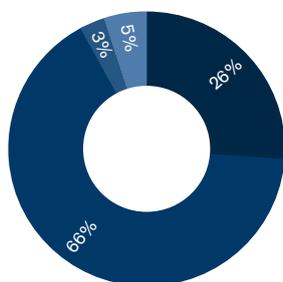
Decide on how much you want to invest and confirm details directly on your device – without any paperwork.

## Choose from three investment strategies

During the digital advisory session, CSX Invest determines your financial situation, risk appetite, and time horizon. Based on these criteria, we will recommend one of three possible investment strategies.

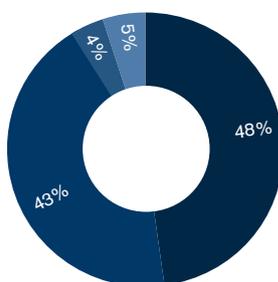
### Casual Walker

Prefers getting to the destination safely while minimizing any hurdles along the way. This strategy has a low share of equities and helps to minimize losses while allowing for some upside potential.



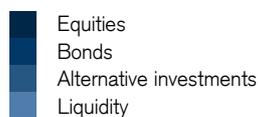
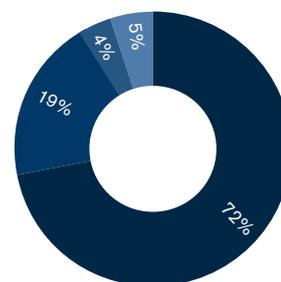
### Confident Hiker

Enjoys uneven terrain, for the rewarding views at the top are worth the uphill strides and some downhill paths. This strategy has a medium share of equities and offers a balance between potential gains during market upswings and losses when markets drop.



### Curious Climber

Seeks the shortest way to the top and doesn't mind taking a fall now and then. This strategy has a high share in equities and a focus on achieving gains while accepting exposure to loss.



The above asset allocations may vary depending on market conditions. For illustrative purposes only.

## Invest in your preferred fund

Take advantage of the opportunity to choose your preferred fund yourself.

	Strategy	Fund	Valor no.	All-in fee (annual) <sup>1</sup>
<b>Global Multi-Index Fund</b> This fund invests globally in a curated selection of cost-efficient and index following ETFs and funds.	Walker	Systematic Index Fund Yield	26378232	1.07%
	Hiker	Systematic Index Fund Balanced	26378224	1.04%
	Climber	Systematic Index Fund Growth	26378230	1.06%
<b>Flagship Fund</b> With the flagship fund, you invest in assets around the globe, ensuring maximum diversification across countries, industries, and asset classes. It has a long track-record of high performance.	Walker	Portfolio Fund Yield	26362936	1.41%
	Hiker	Portfolio Fund Balanced	26362645	1.60%
	Climber	Portfolio Fund Growth	26362874	1.78%
<b>Swiss Focus Fund</b> With the Swiss focus fund, you ensure that the majority of your investment will be in Swiss-issued assets, while still being well diversified across asset classes and industries.	Walker	Privilege 20	27201443	0.67%
	Hiker	Privilege 45	26530564	1.16%
	Climber	Privilege 75	55294091	1.29%
<b>Payout Fund</b> With the payout fund, you invest in a well-diversified portfolio that focuses on assets that generate payouts (e.g. dividends) to your cash account.	Walker	Interest & Dividend Focus Yield	26530928	1.31%
	Hiker	Interest & Dividend Focus Balanced	26530752	1.47%
	Climber	Interest & Dividend Focus Growth	26530793	1.59%

The product's investment objectives, risks, charges and expenses, as well as more complete information about the product, are provided in the prospectus (or relevant offering document), which should be read carefully before investing.

<sup>1</sup> Updated as of March 2023

Source: Credit Suisse

## Contact us

If you have any questions about CSX Invest, we are happy to personally assist you. Contact your client advisor or call us at: Telephone: 0848 880 844\*

\*Telephone calls may be recorded.

You can find more information on CSX Invest and the CSX digital banking offering online at:  
**[credit-suisse.com/csx](https://credit-suisse.com/csx)**

**CSX Invest.** The optimal way to invest.

1. Access/download the Credit Suisse – CSX App
2. Click on “More” → “Save/Invest” → “CSX Invest”

**Download now:**



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