

PREVIOUS PROFIT SCENARIOS

This document presents return outlooks for Evli Equity Factor USA B

EVLI EQUITY FACTOR USA B

RETURN OUTLOOK 31.3.2025

The return an investor receives on a product is determined by market developments. Market developments in the future are uncertain and cannot be predicted accurately.

Recommended investment period: at least 7 years

Example investment: EUR 10.000

The presented figures include all costs related to the product, but do not necessarily include all costs paid by you to an advisor or distributor. The figures do not take into account your personal tax situation, which may also affect the returns you receive.

What you will get from this product depends on future market performance. Market developments in the future are uncertain and cannot be accurately predicted. The unfavourable, moderate, and favourable scenarios shown are illustrations using the worst, average, and best performance of the product over the last 12 years. Markets could develop very differently in the future.

The stress scenario shows what you might get back in extreme market circumstances.

The unfavourable scenario occurred for an investment between 4/2024–3/2025.

The moderate scenario occurred for an investment between 11/2013–10/2020.

The favourable scenario occurred for an investment between 5/2014–4/2021.

EUR 10,000 investment		If you exit after one year	If you exit after the recommended investment horizon
Scenarios			
Stress	What you might get back after costs	6 190 EUR	2 060 EUR
	Average return each year	-38.1 %	-20.2 %
Unfavourable	What you might get back after costs	8 820 EUR	10 330 EUR
	Average return each year	-11.8 %	0.5 %
Moderate	What you might get back after costs	11 200 EUR	20 410 EUR
	Average return each year	12.0 %	10.7 %
Favourable	What you might get back after costs	14 230 EUR	23 450 EUR
	Average return each year	42.3 %	12.9 %

EVLI EQUITY FACTOR USA B

RETURN OUTLOOK 28.2.2025

The return an investor receives on a product is determined by market developments. Market developments in the future are uncertain and cannot be predicted accurately.

Recommended investment period: at least 7 years

Example investment: EUR 10.000

The presented figures include all costs related to the product, but do not necessarily include all costs paid by you to an advisor or distributor. The figures do not take into account your personal tax situation, which may also affect the returns you receive.

What you will get from this product depends on future market performance. Market developments in the future are uncertain and cannot be accurately predicted. The unfavourable, moderate, and favourable scenarios shown are illustrations using the worst, average, and best performance of the product over the last 12 years. Markets could develop very differently in the future.

The stress scenario shows what you might get back in extreme market circumstances.

The unfavourable scenario occurred for an investment between 3/2024–2/2025.

The moderate scenario occurred for an investment between 3/2016–2/2023.

The favourable scenario occurred for an investment between 5/2014–4/2021.

EUR 10,000 investment		If you exit after one year	If you exit after the recommended investment horizon
Scenarios			
Stress	What you might get back after costs	6 130 EUR	2 060 EUR
	Average return each year	-38.7 %	-20.2 %
Unfavourable	What you might get back after costs	8 820 EUR	11 560 EUR
	Average return each year	-11.8 %	2.1 %
Moderate	What you might get back after costs	11 210 EUR	20 480 EUR
	Average return each year	12.1 %	10.8 %
Favourable	What you might get back after costs	14 230 EUR	23 450 EUR
	Average return each year	42.3 %	12.9 %

EVLI EQUITY FACTOR USA B

RETURN OUTLOOK 31.1.2025

The return an investor receives on a product is determined by market developments. Market developments in the future are uncertain and cannot be predicted accurately.

Recommended investment period: at least 7 years

Example investment: EUR 10.000

The presented figures include all costs related to the product, but do not necessarily include all costs paid by you to an advisor or distributor. The figures do not take into account your personal tax situation, which may also affect the returns you receive.

What you will get from this product depends on future market performance. Market developments in the future are uncertain and cannot be accurately predicted. The unfavourable, moderate, and favourable scenarios shown are illustrations using the worst, average, and best performance of the product over the last 12 years. Markets could develop very differently in the future.

The stress scenario shows what you might get back in extreme market circumstances.

The unfavourable scenario occurred for an investment between 12/2016–11/2023.

The moderate scenario occurred for an investment between 3/2016–2/2023.

The favourable scenario occurred for an investment between 2/2013–1/2020.

EUR 10,000 investment		If you exit after one year	If you exit after the recommended investment horizon
Scenarios			
Stress	What you might get back after costs	750 EUR	2 610 EUR
	Average return each year	-92.5 %	-17.5 %
Unfavourable	What you might get back after costs	8 820 EUR	17 660 EUR
	Average return each year	-11.8 %	8.5 %
Moderate	What you might get back after costs	11 210 EUR	20 480 EUR
	Average return each year	12.1 %	10.8 %
Favourable	What you might get back after costs	14 230 EUR	26 380 EUR
	Average return each year	42.3 %	14.9 %

EVLI EQUITY FACTOR USA B

RETURN OUTLOOK 31.12.2024

The return an investor receives on a product is determined by market developments. Market developments in the future are uncertain and cannot be predicted accurately.

Recommended investment period: at least 7 years

Example investment: EUR 10.000

The presented figures include all costs related to the product, but do not necessarily include all costs paid by you to an advisor or distributor. The figures do not take into account your personal tax situation, which may also affect the returns you receive.

What you will get from this product depends on future market performance. Market developments in the future are uncertain and cannot be accurately predicted. The unfavourable, moderate, and favourable scenarios shown are illustrations using the worst, average, and best performance of the product over the last 12 years. Markets could develop very differently in the future.

The stress scenario shows what you might get back in extreme market circumstances.

The unfavourable scenario occurred for an investment between 1/2022–12/2024.

The moderate scenario occurred for an investment between 3/2016–2/2023.

The favourable scenario occurred for an investment between 1/2013–12/2019.

EUR 10,000 investment		If you exit after one year	If you exit after the recommended investment horizon
Scenarios			
Stress	What you might get back after costs	750 EUR	1 420 EUR
	Average return each year	-92.5 %	-24.3 %
Unfavourable	What you might get back after costs	8 820 EUR	16 670 EUR
	Average return each year	-11.8 %	7.6 %
Moderate	What you might get back after costs	11 210 EUR	20 480 EUR
	Average return each year	12.1 %	10.8 %
Favourable	What you might get back after costs	14 230 EUR	26 850 EUR
	Average return each year	42.3 %	15.2 %

EVLI EQUITY FACTOR USA B

RETURN OUTLOOK 30.11.2024

The return an investor receives on a product is determined by market developments. Market developments in the future are uncertain and cannot be predicted accurately.

Recommended investment period: at least 7 years

Example investment: EUR 10.000

The presented figures include all costs related to the product, but do not necessarily include all costs paid by you to an advisor or distributor. The figures do not take into account your personal tax situation, which may also affect the returns you receive.

What you will get from this product depends on future market performance. Market developments in the future are uncertain and cannot be accurately predicted. The unfavourable, moderate, and favourable scenarios shown are illustrations using the worst, average, and best performance of the product over the last 12 years. Markets could develop very differently in the future.

The stress scenario shows what you might get back in extreme market circumstances.

The unfavourable scenario occurred for an investment between 12/2016–11/2023.

The moderate scenario occurred for an investment between 3/2016–2/2023.

The favourable scenario occurred for an investment between 1/2013–12/2019.

EUR 10,000 investment		If you exit after one year	If you exit after the recommended investment horizon
Scenarios			
Stress	What you might get back after costs	750 EUR	440 EUR
	Average return each year	-92.5 %	-36.1 %
Unfavourable	What you might get back after costs	8 820 EUR	17 660 EUR
	Average return each year	-11.8 %	8.5 %
Moderate	What you might get back after costs	11 210 EUR	20 480 EUR
	Average return each year	12.1 %	10.8 %
Favourable	What you might get back after costs	14 230 EUR	26 850 EUR
	Average return each year	42.3 %	15.2 %

EVLI EQUITY FACTOR USA B

RETURN OUTLOOK 31.10.2024

The return an investor receives on a product is determined by market developments. Market developments in the future are uncertain and cannot be predicted accurately.

Recommended investment period: at least 7 years

Example investment: EUR 10.000

The presented figures include all costs related to the product, but do not necessarily include all costs paid by you to an advisor or distributor. The figures do not take into account your personal tax situation, which may also affect the returns you receive.

What you will get from this product depends on future market performance. Market developments in the future are uncertain and cannot be accurately predicted. The unfavourable, moderate, and favourable scenarios shown are illustrations using the worst, average, and best performance of the product over the last 12 years. Markets could develop very differently in the future.

The stress scenario shows what you might get back in extreme market circumstances.

The unfavourable scenario occurred for an investment between 1/2022–10/2024.

The moderate scenario occurred for an investment between 3/2016–2/2023.

The favourable scenario occurred for an investment between 1/2013–12/2019.

EUR 10,000 investment		If you exit after one year	If you exit after the recommended investment horizon
Scenarios			
Stress	What you might get back after costs	750 EUR	440 EUR
	Average return each year	-92.5 %	-36.1 %
Unfavourable	What you might get back after costs	8 820 EUR	15 560 EUR
	Average return each year	-11.8 %	6.5 %
Moderate	What you might get back after costs	11 210 EUR	20 480 EUR
	Average return each year	12.1 %	10.8 %
Favourable	What you might get back after costs	14 230 EUR	26 850 EUR
	Average return each year	42.3 %	15.2 %

EVLI EQUITY FACTOR USA B

RETURN OUTLOOK 30.9.2024

The return an investor receives on a product is determined by market developments. Market developments in the future are uncertain and cannot be predicted accurately.

Recommended investment period: at least 7 years

Example investment: EUR 10.000

The presented figures include all costs related to the product, but do not necessarily include all costs paid by you to an advisor or distributor. The figures do not take into account your personal tax situation, which may also affect the returns you receive.

What you will get from this product depends on future market performance. Market developments in the future are uncertain and cannot be accurately predicted. The unfavourable, moderate, and favourable scenarios shown are illustrations using the worst, average, and best performance of the product over the last 12 years. Markets could develop very differently in the future.

The stress scenario shows what you might get back in extreme market circumstances.

The unfavourable scenario occurred for an investment between 1/2022–9/2024.

The moderate scenario occurred for an investment between 9/2015–8/2022.

The favourable scenario occurred for an investment between 1/2013–12/2019.

EUR 10,000 investment		If you exit after one year	If you exit after the recommended investment horizon
Scenarios			
Stress	What you might get back after costs	750 EUR	2 850 EUR
	Average return each year	-92.5 %	-16.4 %
Unfavourable	What you might get back after costs	8 820 EUR	15 610 EUR
	Average return each year	-11.8 %	6.6 %
Moderate	What you might get back after costs	11 210 EUR	20 480 EUR
	Average return each year	12.1 %	10.8 %
Favourable	What you might get back after costs	14 230 EUR	26 850 EUR
	Average return each year	42.3 %	15.2 %

EVLI EQUITY FACTOR USA B

RETURN OUTLOOK 31.8.2024

The return an investor receives on a product is determined by market developments. Market developments in the future are uncertain and cannot be predicted accurately.

Recommended investment period: at least 7 years

Example investment: EUR 10.000

The presented figures include all costs related to the product, but do not necessarily include all costs paid by you to an advisor or distributor. The figures do not take into account your personal tax situation, which may also affect the returns you receive.

What you will get from this product depends on future market performance. Market developments in the future are uncertain and cannot be accurately predicted. The unfavourable, moderate, and favourable scenarios shown are illustrations using the worst, average, and best performance of the product over the last 12 years. Markets could develop very differently in the future.

The stress scenario shows what you might get back in extreme market circumstances.

The unfavourable scenario occurred for an investment between 1/2022–8/2024.

The moderate scenario occurred for an investment between 9/2015–8/2022.

The favourable scenario occurred for an investment between 1/2013–12/2019.

EUR 10,000 investment		If you exit after one year	If you exit after the recommended investment horizon
Scenarios			
Stress	What you might get back after costs	750 EUR	2 850 EUR
	Average return each year	-92.5 %	-16.4 %
Unfavourable	What you might get back after costs	8 820 EUR	15 900 EUR
	Average return each year	-11.8 %	6.9 %
Moderate	What you might get back after costs	11 200 EUR	20 480 EUR
	Average return each year	12.0 %	10.8 %
Favourable	What you might get back after costs	14 230 EUR	26 850 EUR
	Average return each year	42.3 %	15.2 %

EVLI EQUITY FACTOR USA B

RETURN OUTLOOK 31.7.2024

The return an investor receives on a product is determined by market developments. Market developments in the future are uncertain and cannot be predicted accurately.

Recommended investment period: at least 7 years

Example investment: EUR 10.000

The presented figures include all costs related to the product, but do not necessarily include all costs paid by you to an advisor or distributor. The figures do not take into account your personal tax situation, which may also affect the returns you receive.

What you will get from this product depends on future market performance. Market developments in the future are uncertain and cannot be accurately predicted. The unfavourable, moderate, and favourable scenarios shown are illustrations using the worst, average, and best performance of the product over the last 12 years. Markets could develop very differently in the future.

The stress scenario shows what you might get back in extreme market circumstances.

The unfavourable scenario occurred for an investment between 1/2022–7/2024.

The moderate scenario occurred for an investment between 9/2015–8/2022.

The favourable scenario occurred for an investment between 1/2013–12/2019.

EUR 10,000 investment		If you exit after one year	If you exit after the recommended investment horizon
Scenarios			
Stress	What you might get back after costs	750 EUR	2 850 EUR
	Average return each year	-92.5 %	-16.4 %
Unfavourable	What you might get back after costs	8 820 EUR	16 150 EUR
	Average return each year	-11.8 %	7.1 %
Moderate	What you might get back after costs	11 200 EUR	20 480 EUR
	Average return each year	12.0 %	10.8 %
Favourable	What you might get back after costs	14 230 EUR	26 850 EUR
	Average return each year	42.3 %	15.2 %

EVLI EQUITY FACTOR USA B

RETURN OUTLOOK 30.6.2024

The return an investor receives on a product is determined by market developments. Market developments in the future are uncertain and cannot be predicted accurately.

Recommended investment period: at least 7 years

Example investment: EUR 10.000

The presented figures include all costs related to the product, but do not necessarily include all costs paid by you to an advisor or distributor. The figures do not take into account your personal tax situation, which may also affect the returns you receive.

What you will get from this product depends on future market performance. Market developments in the future are uncertain and cannot be accurately predicted. The unfavourable, moderate, and favourable scenarios shown are illustrations using the worst, average, and best performance of the product over the last 12 years. Markets could develop very differently in the future.

The stress scenario shows what you might get back in extreme market circumstances.

The unfavourable scenario occurred for an investment between 1/2022–6/2024.

The moderate scenario occurred for an investment between 9/2015–8/2022.

The favourable scenario occurred for an investment between 1/2013–12/2019.

EUR 10,000 investment		If you exit after one year	If you exit after the recommended investment horizon
Scenarios			
Stress	What you might get back after costs	750 EUR	2 860 EUR
	Average return each year	-92.5 %	-16.4 %
Unfavourable	What you might get back after costs	8 820 EUR	14 480 EUR
	Average return each year	-11.8 %	5.4 %
Moderate	What you might get back after costs	11 200 EUR	20 480 EUR
	Average return each year	12.0 %	10.8 %
Favourable	What you might get back after costs	14 230 EUR	26 850 EUR
	Average return each year	42.3 %	15.2 %

EVLI EQUITY FACTOR USA B

RETURN OUTLOOK 31.5.2024

The return an investor receives on a product is determined by market developments. Market developments in the future are uncertain and cannot be predicted accurately.

Recommended investment period: at least 7 years

Example investment: EUR 10.000

The presented figures include all costs related to the product, but do not necessarily include all costs paid by you to an advisor or distributor. The figures do not take into account your personal tax situation, which may also affect the returns you receive.

What you will get from this product depends on future market performance. Market developments in the future are uncertain and cannot be accurately predicted. The unfavourable, moderate, and favourable scenarios shown are illustrations using the worst, average, and best performance of the product over the last 12 years. Markets could develop very differently in the future.

The stress scenario shows what you might get back in extreme market circumstances.

The unfavourable scenario occurred for an investment between 1/2022–5/2024.

The moderate scenario occurred for an investment between 2/2016–1/2023.

The favourable scenario occurred for an investment between 1/2013–12/2019.

EUR 10,000 investment		If you exit after one year	If you exit after the recommended investment horizon
Scenarios			
Stress	What you might get back after costs	750 EUR	2 860 EUR
	Average return each year	-92.5 %	-16.4 %
Unfavourable	What you might get back after costs	8 820 EUR	13 840 EUR
	Average return each year	-11.8 %	4.7 %
Moderate	What you might get back after costs	11 200 EUR	20 620 EUR
	Average return each year	12.0 %	10.9 %
Favourable	What you might get back after costs	14 230 EUR	26 850 EUR
	Average return each year	42.3 %	15.2 %

EVLI EQUITY FACTOR USA B

RETURN OUTLOOK 30.4.2024

The return an investor receives on a product is determined by market developments. Market developments in the future are uncertain and cannot be predicted accurately.

Recommended investment period: at least 7 years

Example investment: EUR 10.000

The presented figures include all costs related to the product, but do not necessarily include all costs paid by you to an advisor or distributor. The figures do not take into account your personal tax situation, which may also affect the returns you receive.

What you will get from this product depends on future market performance. Market developments in the future are uncertain and cannot be accurately predicted. The unfavourable, moderate, and favourable scenarios shown are illustrations using the worst, average, and best performance of the product over the last 12 years. Markets could develop very differently in the future.

The stress scenario shows what you might get back in extreme market circumstances.

The unfavourable scenario occurred for an investment between 1/2022–4/2024.

The moderate scenario occurred for an investment between 8/2013–7/2020.

The favourable scenario occurred for an investment between 1/2013–12/2019.

EUR 10,000 investment		If you exit after one year	If you exit after the recommended investment horizon
Scenarios			
Stress	What you might get back after costs	750 EUR	2 850 EUR
	Average return each year	-92.5 %	-16.4 %
Unfavourable	What you might get back after costs	8 820 EUR	13 420 EUR
	Average return each year	-11.8 %	4.3 %
Moderate	What you might get back after costs	11 200 EUR	20 760 EUR
	Average return each year	12.0 %	11.0 %
Favourable	What you might get back after costs	14 230 EUR	26 850 EUR
	Average return each year	42.3 %	15.2 %