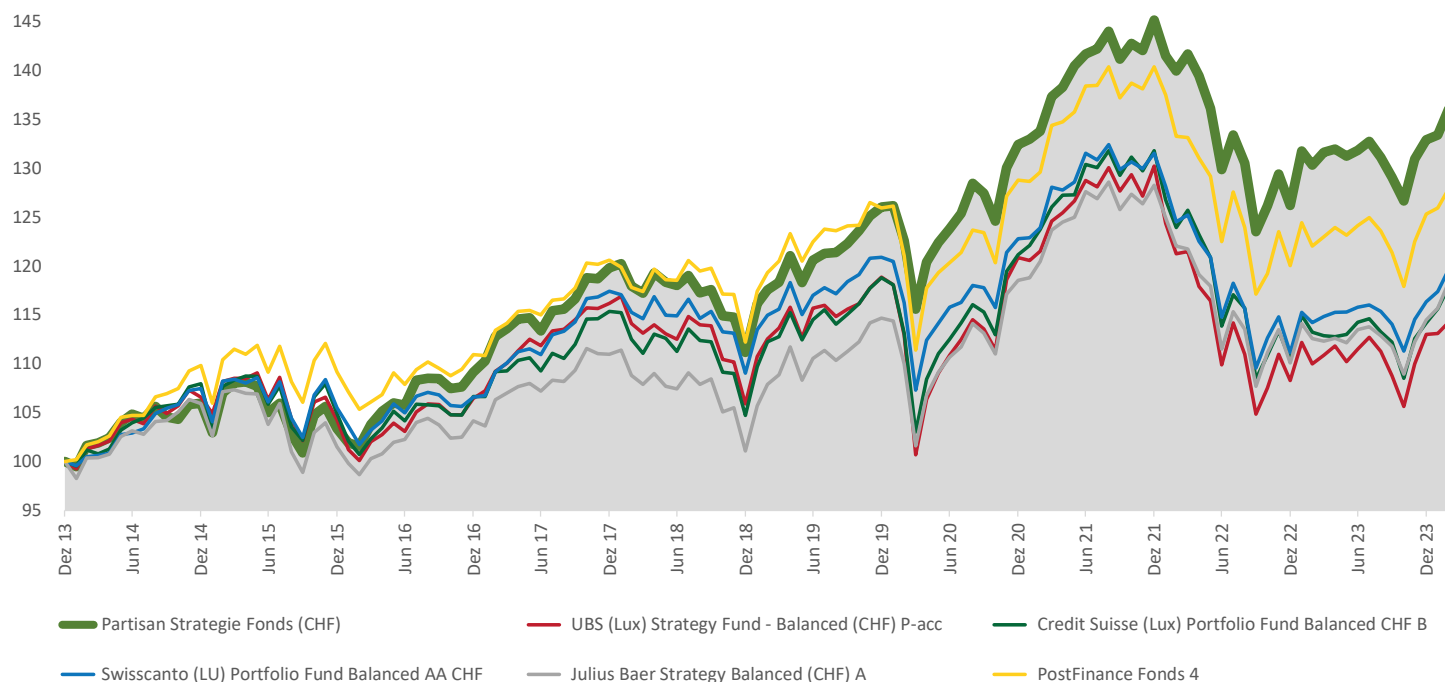


# Der PARTISAN im Konkurrenzvergleich per

29.02.24

Direkte Konkurrenzfonds ("CHF ausgeglichen") der grössten Anbieter in der Schweiz



## Renditevergleich\* mit ähnlichen Strategiefonds (Aktienquote ca. 40%-55%)

	seit Beginn (31.12.2013)	10 Jahre	5 Jahre	3 Jahre	dieses Jahr	Corona- Drawdown (19.Feb. - 23.März 20)	Volatilität (3y)
<b>Partisan Strategie Fonds (CHF)</b>	<b>36%</b>	<b>34%</b>	<b>16%</b>	<b>2%</b>	<b>2.4%</b>	<b>-15.8%</b>	<b>7.4%</b>
<b>Durchschnitt Vergleichsfonds</b>	<b>20%</b>	<b>19%</b>	<b>7%</b>	<b>-2%</b>	<b>2.3%</b>	<b>-18.4%</b>	<b>7.5%</b>
AXA (CH) Strategy Fund – Portfolio 40 A	12%	12%	4%	0%	2.3%	-10.1%	5.8%
BCV Stratégie Equipondéré Inc	21%	20%	7%	1%	2.9%	-17.6%	6.6%
BEKB Strategiefonds Ausgewogen - B			9%	-1%	2.4%	-16.3%	7.2%
BKB Anlageloesung- Ausgewogen (CHF) B			10%	0%	2.7%	-15.7%	7.4%
Clientis Fonds (CH) - Balanced A	13%	12%	2%	-5%	1.4%	-19.6%	7.0%
Credit Suisse (Lux) Portfolio Fund Balanced CHF B	18%	17%	5%	-5%	3.2%	-20.6%	8.2%
Credit Suisse (Lux) IndexSelection Fund Balanced CHF B Acc	22%	21%	10%	2%	2.0%	-22.0%	8.5%
Credit Suisse (CH) Interest & Dividend Focus Balanced CHF A	21%	20%	6%	1%	1.5%	-26.0%	7.8%
Julius Baer Strategy Balanced (CHF) A	18%	18%	10%	-2%	3.4%	-19.2%	7.7%
LLB Strategie Ausgewogen (CHF)	12%	10%	1%	-2%	1.6%	-19.3%	7.9%
LO Funds (CH) - Balanced Allocation (CHF) P D	13%	12%	2%	-6%	3.8%	-21.4%	7.3%
LUKB Expert-Zuwachs	26%	25%	7%	0%	2.7%	-20.2%	7.4%
Migros Bank (CH) Fonds - Sustainable 45 A	30%	28%	10%	1%	1.9%	-15.8%	7.4%
Migros Bank (Lux) Fonds - 50 A	27%	26%	8%	0%	2.7%	-18.2%	7.3%
Pictet CH - LPP 40 R dy CHF	20%	18%	4%	-5%	2.5%	-14.6%	7.3%
PostFinance Fonds 4	28%	26%	7%	-1%	2.1%	-19.0%	8.2%
Raiffeisen Pension Invest Futura Balanced B	26%	25%	4%	-5%	2.0%	-17.5%	8.1%
Reichmuth Alpin Classic	18%	16%	2%	-5%	0.8%	-15.5%	7.4%
SGKB (CH) Fund – Strategie Ausgewogen A	24%	22%	9%	1%	2.6%	-20.4%	7.1%
SZKB Strategiefonds Ausgewogen A			12%	3%	3.0%	-16.9%	6.8%
Swiss Life Funds (CH) - Portfolio Global Balanced (CHF) A1	23%	21%	9%	0%	2.6%	-17.6%	8.0%
Swisscanto (LU) Portfolio Fund Balanced AA CHF	20%	19%	4%	-3%	2.8%	-18.2%	7.5%
Swisscanto (LU) Portfolio Fund Green Invest Balanced AA CHF	33%	31%	14%	-4%	2.8%	-19.9%	8.1%
Synchrony (CH) Balanced (CHF)	13%	12%	4%	-2%	3.0%	-16.3%	7.4%
TKB Vermoegensverwaltung - Ausgewogen (CHF) A			8%	-1%	2.4%	-17.7%	7.5%
UBS (Lux) Strategy Fund - Balanced (CHF) P-acc	14%	13%	2%	-6%	1.1%	-23.4%	8.8%
UBS (Lux) Strategy Xtra SICAV - Balanced (CHF) P-acc	9%	8%	2%	-5%	1.4%	-21.6%	7.1%
UBS (CH) Suisse - 45 (CHF) P-dist	30%	27%	9%	-1%	1.5%	-20.4%	7.4%
VP Bank Strategy Fund Balanced (CHF) C	8%	7%	4%	-5%	2.0%	-18.2%	6.7%
ZugerKB Fonds - Strategie Ausgewogen (CHF) B			10%	-5%	1.8%	-14.4%	7.6%
Zurich Invest II - Target Investment Fund 45 CHF B	29%	27%	11%	-1%	2.3%	-18.4%	7.9%

\* nach Fees, Ausschüttungen reinvestiert