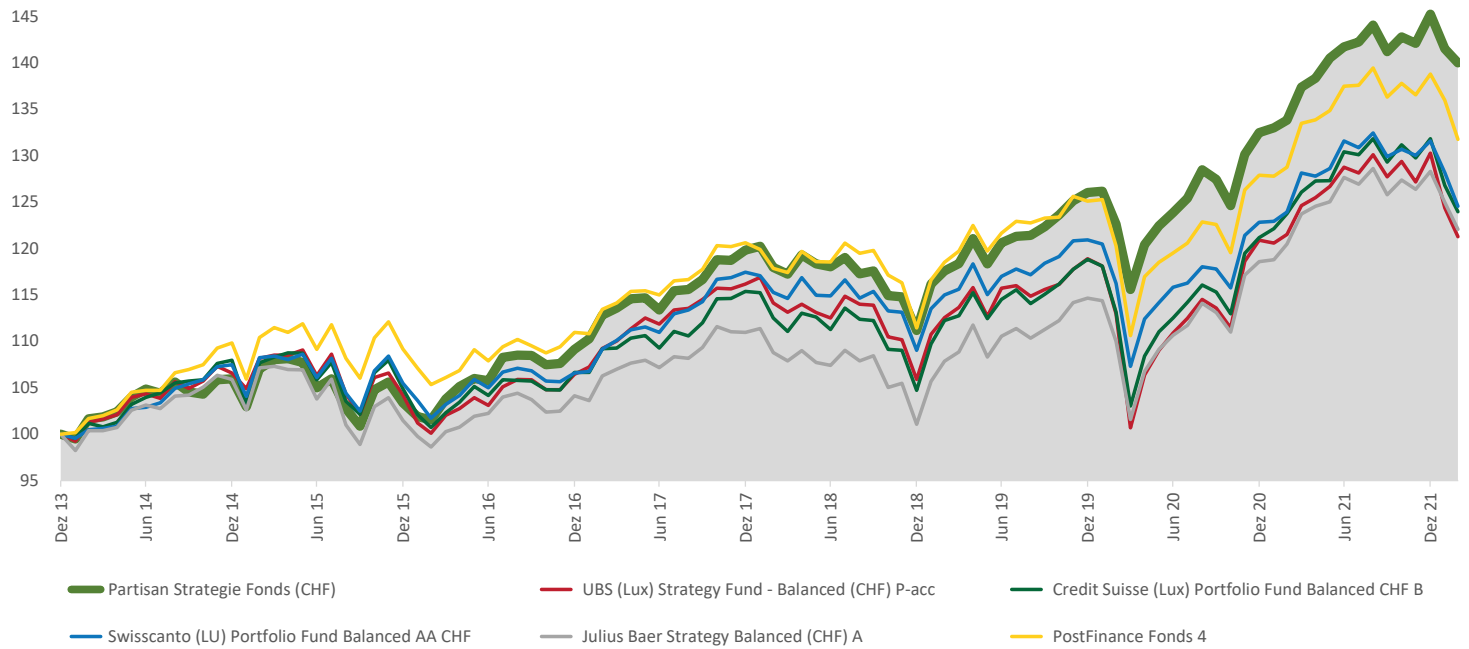


# Der PARTISAN im Konkurrenzvergleich per 28.02.22

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



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

	seit Beginn (31.12.2013)	5 Jahre	3 Jahre	dieses Jahr	Corona- Drawdown (19.Feb. - 23.März 20)	Volatilität (3y)
<b>Partisan Strategie Fonds (CHF)</b>	<b>40%</b>	<b>24%</b>	<b>19%</b>	<b>-3.6%</b>	<b>-15.8%</b>	<b>7%</b>
<b>Durchschnitt Vergleichsfonds</b>	<b>25%</b>	<b>15%</b>	<b>11%</b>	<b>-5.1%</b>	<b>-18.4%</b>	<b>8%</b>
AXA (CH) Strategy Fund – Portfolio 40 A	13%	6%	5%	-4.1%	-10.1%	6%
BCV Stratégie Equipondéré Inc	22%	14%	8%	-4.5%	-17.6%	8%
BEKB Strategiefonds Ausgewogen - B		16%	11%	-4.8%	-16.3%	7%
BKB Anlageloesung- Ausgewogen (CHF) B		21%	13%	-5.2%	-15.7%	8%
Clientis Fonds (CH) - Balanced A	19%	12%	7%	-5.9%	-19.6%	8%
Credit Suisse (Lux) Portfolio Fund Balanced CHF B	24%	14%	10%	-6.0%	-20.6%	9%
Credit Suisse (Lux) IndexSelection Fund Balanced CHF B Acc	26%	16%	13%	-5.1%	-22.0%	10%
Credit Suisse (CH) Interest & Dividend Focus Balanced CHF A	27%	13%	10%	-3.1%	-26.0%	11%
Julius Baer Strategy Balanced (CHF) A	22%	15%	13%	-4.9%	-19.2%	9%
LLB Strategie Ausgewogen (CHF)	17%	9%	6%	-4.6%	-19.3%	8%
LO Funds (CH) - Balanced Allocation (CHF) P D	22%	15%	10%	-5.2%	-21.4%	9%
LUKB Expert-Zuwachs	29%	19%	10%	-3.7%	-20.2%	8%
Migros Bank (CH) Fonds - Sustainable 45 A	33%	18%	13%	-5.4%	-15.8%	7%
Migros Bank (Lux) Fonds - 50 A	30%	17%	10%	-4.8%	-18.2%	8%
Pictet CH - LPP 40 R dy CHF	25%	12%	8%	-6.0%	-14.6%	7%
PostFinance Fonds 4	32%	16%	11%	-5.1%	-19.0%	9%
Raiffeisen Pension Invest Futura Balanced B	33%	15%	10%	-6.5%	-17.5%	8%
Reichmuth Alpin Classic	26%	12%	9%	-4.4%	-15.5%	8%
SGKB (CH) Fund – Strategie Ausgewogen A	24%	14%	9%	-5.0%	-20.4%	9%
SZKB Strategiefonds Ausgewogen A		17%	11%	-4.3%	-16.9%	7%
Swiss Life Funds (CH) - Portfolio Global Balanced (CHF) A1	28%	19%	13%	-5.7%	-17.6%	8%
Swisscanto (LU) Portfolio Fund Balanced AA CHF	25%	14%	8%	-5.3%	-18.2%	8%
Swisscanto (LU) Portfolio Fund Green Invest Balanced AA CHF	38%	28%	18%	-6.5%	-19.9%	10%
Synchrony (CH) Balanced (CHF)	15%	11%	7%	-5.8%	-16.3%	8%
TKB Vermoegensverwaltung - Ausgewogen (CHF) A		18%	13%	-5.3%	-17.7%	8%
UBS (Lux) Strategy Fund - Balanced (CHF) P-acc	21%	11%	8%	-6.9%	-23.4%	10%
UBS (Lux) Strategy Xtra SICAV - Balanced (CHF) P-acc	16%	10%	8%	-4.9%	-21.6%	9%
UBS (CH) Suisse - 45 (CHF) P-dist	35%	19%	14%	-4.8%	-20.4%	8%
VP Bank Strategy Fund Balanced (CHF) C	13%	10%	9%	-5.4%	-18.2%	8%
ZugerKB Fonds - Strategie Ausgewogen (CHF) B		23%	16%	-5.2%	-14.4%	8%
Zurich Invest II - Target Investment Fund 45 CHF B	33%	20%	14%	-5.4%	-18.4%	8%

\* Nach Kosten, Ausschüttungen reinvestiert