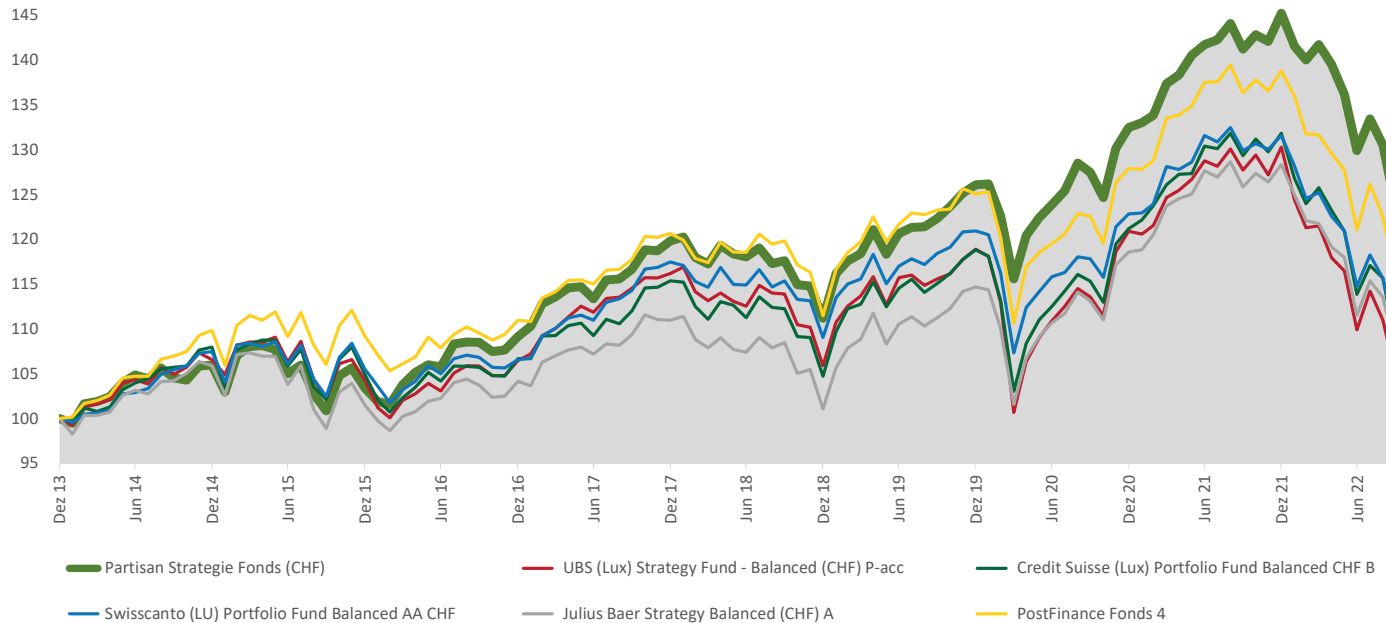


Der PARTISAN im Konkurrenzvergleich per

31.10.22

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)
Partisan Strategie Fonds (CHF)	26%	6%	2%	-13.1%	-15.8%	8.2%
Durchschnitt Vergleichsfonds	13%	-1%	-4%	-14.2%	-18.4%	9.1%
AXA (CH) Strategy Fund – Portfolio 40 A	4%	-6%	-7%	-12.1%	-10.1%	6.1%
BCV Stratégie Equipondéré Inc	13%	0%	-2%	-11.4%	-17.6%	8.2%
BEKB Strategiefonds Ausgewogen - B		1%	-3%	-13.5%	-16.3%	8.3%
BKB Anlageloesung- Ausgewogen (CHF) B		5%	0%	-12.3%	-15.7%	8.7%
Clientis Fonds (CH) - Balanced A	8%	-5%	-6%	-14.6%	-19.6%	9.0%
Credit Suisse (Lux) Portfolio Fund Balanced CHF B	11%	-3%	-5%	-15.9%	-20.6%	10.2%
Credit Suisse (Lux) IndexSelection Fund Balanced CHF B Acc	13%	-1%	-3%	-14.8%	-22.0%	10.8%
Credit Suisse (CH) Interest & Dividend Focus Balanced CHF A	16%	-1%	-2%	-10.8%	-26.0%	11.6%
Julius Baer Strategy Balanced (CHF) A	11%	0%	-1%	-13.4%	-19.2%	9.5%
LLB Strategie Ausgewogen (CHF)	4%	-8%	-8%	-14.5%	-19.3%	9.4%
LO Funds (CH) - Balanced Allocation (CHF) P D	7%	-5%	-8%	-16.4%	-21.4%	9.3%
LUKB Expert-Zuwachs	18%	0%	-4%	-11.9%	-20.2%	9.2%
Migros Bank (CH) Fonds - Sustainable 45 A	21%	3%	-3%	-13.8%	-15.8%	8.2%
Migros Bank (Lux) Fonds - 50 A	20%	1%	-3%	-12.6%	-18.2%	9.0%
Pictet CH - LPP 40 R dy CHF	12%	-4%	-8%	-15.9%	-14.6%	7.9%
PostFinance Fonds 4	18%	-2%	-4%	-15.1%	-19.0%	9.8%
Raiffeisen Pension Invest Futura Balanced B	17%	-5%	-8%	-17.9%	-17.5%	9.1%
Reichmuth Alpin Classic	12%	-6%	-6%	-15.1%	-15.5%	8.7%
SGKB (CH) Fund – Strategie Ausgewogen A	15%	-1%	-2%	-11.9%	-20.4%	9.6%
SZKB Strategiefonds Ausgewogen A		3%	-2%	-11.9%	-16.9%	8.0%
Swiss Life Funds (CH) - Portfolio Global Balanced (CHF) A1	16%	1%	-3%	-15.0%	-17.6%	9.2%
Swisscanto (LU) Portfolio Fund Balanced AA CHF	13%	-3%	-5%	-14.4%	-18.2%	9.1%
Swisscanto (LU) Portfolio Fund Green Invest Balanced AA CHF	25%	7%	4%	-15.0%	-19.9%	10.4%
Synchrony (CH) Balanced (CHF)	6%	-4%	-4%	-13.6%	-16.3%	8.6%
TKB Vermoegensverwaltung - Ausgewogen (CHF) A		0%	-3%	-14.9%	-17.7%	8.6%
UBS (Lux) Strategy Fund - Balanced (CHF) P-acc	8%	-7%	-7%	-17.5%	-23.4%	11.3%
UBS (Lux) Strategy Xtra SICAV - Balanced (CHF) P-acc	5%	-6%	-5%	-14.3%	-21.6%	9.8%
UBS (CH) Suisse - 45 (CHF) P-dist	22%	2%	-2%	-14.1%	-20.4%	9.3%
VP Bank Strategy Fund Balanced (CHF) C	2%	-5%	-4%	-14.8%	-18.2%	8.7%
ZugerKB Fonds - Strategie Ausgewogen (CHF) B		2%	-3%	-15.9%	-14.4%	8.5%
Zurich Invest II - Target Investment Fund 45 CHF B	20%	2%	-3%	-14.7%	-18.4%	9.4%

* Nach Kosten, Ausschüttungen reinvestiert