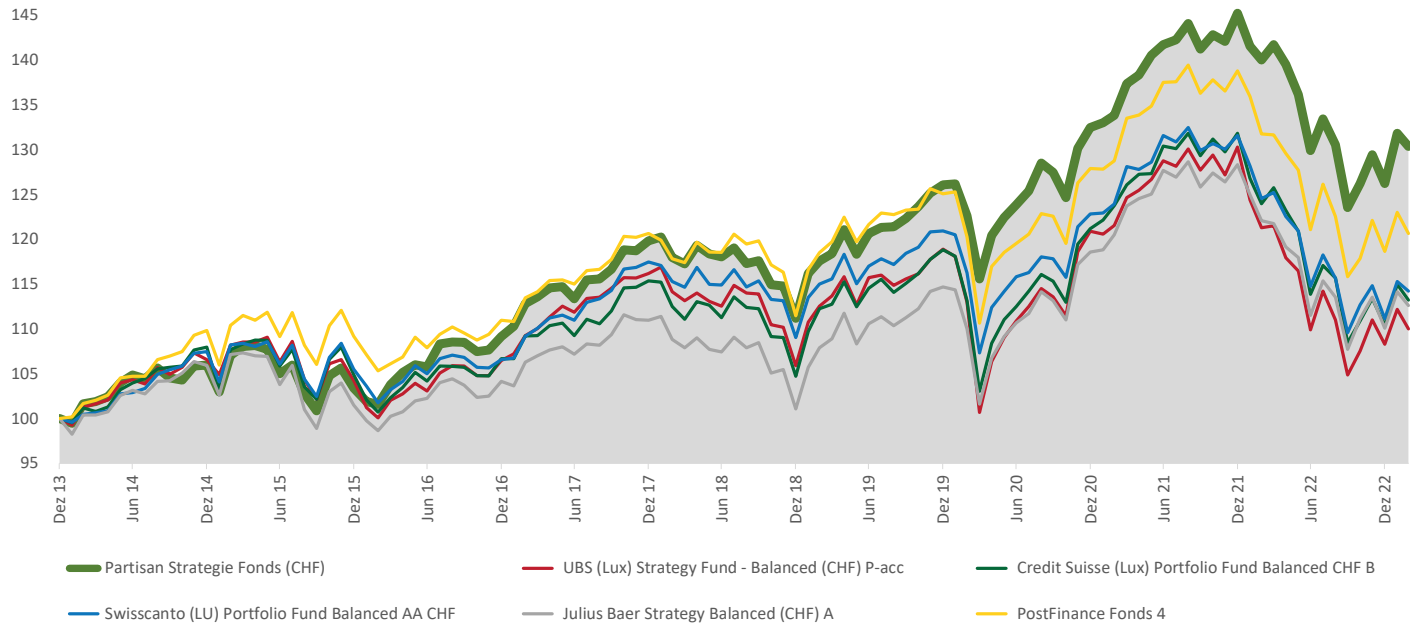


Der PARTISAN im Konkurrenzvergleich per

28.02.23

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)	30%	11%	6%	3.3%	-15.8%	8.8%
Durchschnitt Vergleichsfonds	15%	2%	0%	2.3%	-18.4%	9.6%
AXA (CH) Strategy Fund – Portfolio 40 A	4%	-4%	-5%	2.3%	-10.1%	6.6%
BCV Stratégie Equipondéré Inc	15%	2%	1%	2.1%	-17.6%	8.6%
BEKB Strategiefonds Ausgewogen - B		4%	-1%	2.5%	-16.3%	8.8%
BKB Anlageloesung- Ausgewogen (CHF) B		7%	1%	2.2%	-15.7%	8.9%
Clientis Fonds (CH) - Balanced A	10%	-1%	-1%	1.8%	-19.6%	9.3%
Credit Suisse (Lux) Portfolio Fund Balanced CHF B	13%	1%	0%	2.5%	-20.6%	10.6%
Credit Suisse (Lux) IndexSelection Fund Balanced CHF B Acc	17%	4%	5%	3.0%	-22.0%	11.4%
Credit Suisse (CH) Interest & Dividend Focus Balanced CHF A	20%	4%	5%	2.8%	-26.0%	12.0%
Julius Baer Strategy Balanced (CHF) A	13%	3%	2%	2.3%	-19.2%	9.9%
LLB Strategie Ausgewogen (CHF)	7%	-4%	-3%	2.5%	-19.3%	9.9%
LO Funds (CH) - Balanced Allocation (CHF) P D	9%	-2%	-5%	1.7%	-21.4%	9.7%
LUKB Expert-Zuwachs	20%	4%	1%	2.4%	-20.2%	9.6%
Migros Bank (CH) Fonds - Sustainable 45 A	24%	7%	0%	2.6%	-15.8%	8.6%
Migros Bank (Lux) Fonds - 50 A	22%	5%	2%	2.9%	-18.2%	9.4%
Pictet CH - LPP 40 R dy CHF	12%	-2%	-7%	1.6%	-14.6%	8.5%
PostFinance Fonds 4	21%	2%	0%	1.7%	-19.0%	10.4%
Raiffeisen Pension Invest Futura Balanced B	19%	-1%	-4%	1.6%	-17.5%	9.6%
Reichmuth Alpin Classic	15%	-2%	-3%	2.4%	-15.5%	9.2%
SGKB (CH) Fund – Strategie Ausgewogen A	17%	3%	2%	2.4%	-20.4%	10.1%
SZKB Strategiefonds Ausgewogen A		6%	1%	2.5%	-16.9%	8.4%
Swiss Life Funds (CH) - Portfolio Global Balanced (CHF) A1	17%	5%	0%	2.4%	-17.6%	9.6%
Swisscanto (LU) Portfolio Fund Balanced AA CHF	14%	-1%	-2%	2.8%	-18.2%	9.5%
Swisscanto (LU) Portfolio Fund Green Invest Balanced AA CHF	28%	11%	7%	3.0%	-19.9%	10.9%
Synchrony (CH) Balanced (CHF)	8%	-1%	0%	2.9%	-16.3%	9.0%
TKB Vermoegensverwaltung - Ausgewogen (CHF) A		5%	1%	2.8%	-17.7%	9.1%
UBS (Lux) Strategy Fund - Balanced (CHF) P-acc	10%	-4%	-3%	1.6%	-23.4%	11.7%
UBS (Lux) Strategy Xtra SICAV - Balanced (CHF) P-acc	7%	-3%	0%	1.6%	-21.6%	10.1%
UBS (CH) Suisse - 45 (CHF) P-dist	25%	6%	2%	2.2%	-20.4%	9.7%
VP Bank Strategy Fund Balanced (CHF) C	4%	-1%	-1%	1.6%	-18.2%	9.1%
ZugerKB Fonds - Strategie Ausgewogen (CHF) B		5%	-1%	1.9%	-14.4%	8.9%
Zurich Invest II - Target Investment Fund 45 CHF B	23%	6%	2%	2.9%	-18.4%	9.8%

* Nach Kosten, Ausschüttungen reinvestiert