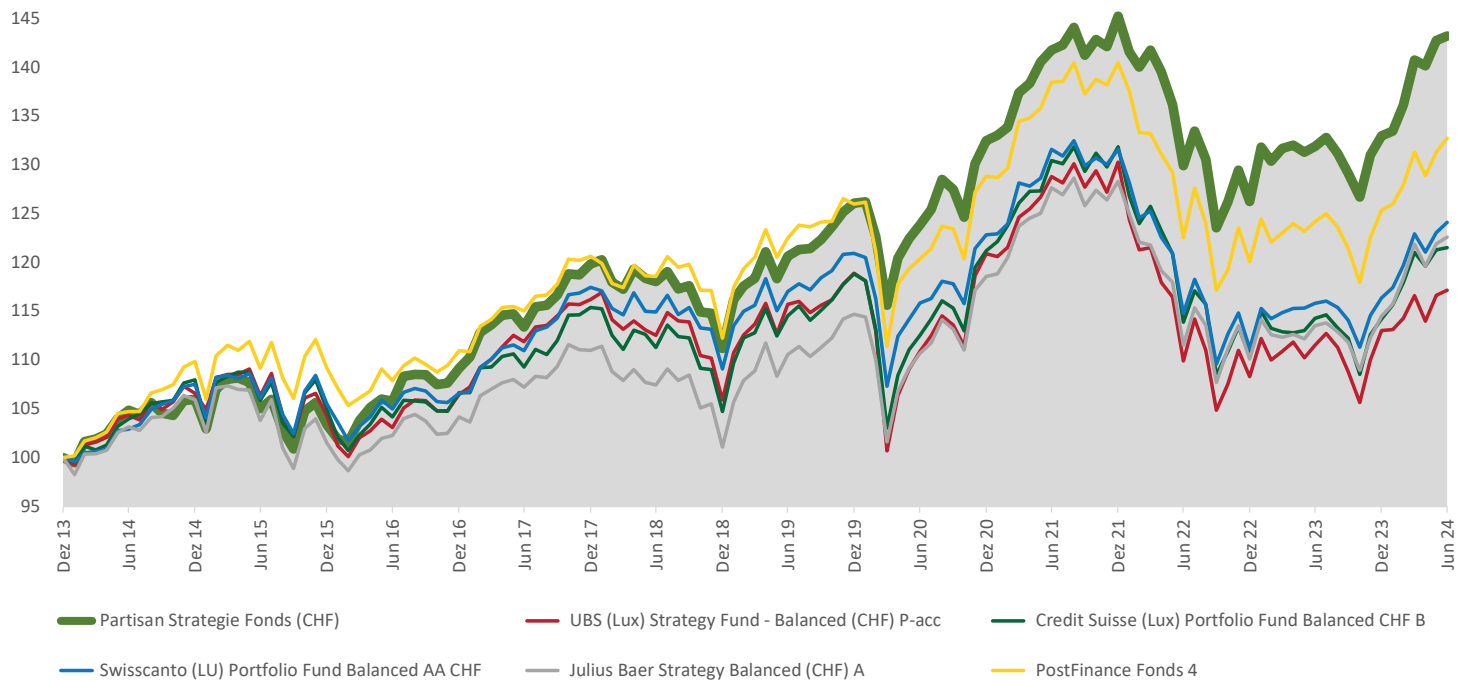


# Der PARTISAN im Konkurrenzvergleich per

30.06.24

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>43%</b>	<b>37%</b>	<b>19%</b>	<b>1%</b>	<b>7.7%</b>	<b>-15.8%</b>	<b>7.5%</b>
<b>Durchschnitt Vergleichsfonds</b>	<b>25%</b>	<b>20%</b>	<b>8%</b>	<b>-4%</b>	<b>6.0%</b>	<b>-18.4%</b>	<b>7.5%</b>
AXA (CH) Strategy Fund – Portfolio 40 A	14%	11%	3%	-2%	3.9%	-10.1%	5.8%
BCV Stratégie Equipondéré Inc	26%	22%	9%	-1%	7.0%	-17.6%	6.6%
BEKB Strategiefonds Ausgewogen - B			10%	-2%	6.3%	-16.3%	7.2%
BKB Anlageloesung- Ausgewogen (CHF) B			10%	-3%	7.0%	-15.7%	7.4%
Clientis Fonds (CH) - Balanced A	19%	15%	5%	-6%	6.4%	-19.6%	7.3%
Credit Suisse (Lux) Portfolio Fund Balanced CHF B	21%	17%	6%	-7%	6.4%	-20.6%	8.3%
Credit Suisse (Lux) IndexSelection Fund Balanced CHF B Acc	27%	21%	11%	-2%	5.6%	-22.0%	8.5%
Credit Suisse (CH) Interest & Dividend Focus Balanced CHF A	26%	21%	7%	-3%	5.3%	-26.0%	7.6%
Julius Baer Strategy Balanced (CHF) A	23%	19%	11%	-4%	7.1%	-19.2%	7.8%
LLB Strategie Ausgewogen (CHF)	15%	11%	3%	-5%	4.9%	-19.3%	7.9%
LO Funds (CH) - Balanced Allocation (CHF) P D	18%	14%	3%	-8%	8.0%	-21.4%	7.4%
LUKB Expert-Zuwachs	31%	27%	9%	-2%	6.8%	-20.2%	7.4%
Migros Bank (CH) Fonds - Sustainable 45 A	35%	29%	10%	-2%	5.6%	-15.8%	7.3%
Migros Bank (Lux) Fonds - 50 A	32%	27%	9%	-2%	6.6%	-18.2%	7.3%
Pictet CH - LPP 40 R dy CHF	24%	19%	4%	-7%	6.0%	-14.6%	7.4%
PostFinance Fonds 4	33%	27%	8%	-4%	5.9%	-19.0%	8.3%
Raiffeisen Pension Invest Futura Balanced B	31%	25%	4%	-8%	5.6%	-17.5%	8.2%
Reichmuth Alpin Classic	22%	17%	3%	-8%	4.2%	-15.5%	7.4%
SGKB (CH) Fund – Strategie Ausgewogen A	30%	25%	11%	-1%	7.4%	-20.4%	7.0%
SZKB Strategiefonds Ausgewogen A			14%	2%	7.9%	-16.9%	7.0%
Swiss Life Funds (CH) - Portfolio Global Balanced (CHF) A1	27%	22%	9%	-4%	6.2%	-17.6%	8.0%
Swisscanto (LU) Portfolio Fund Balanced AA CHF	24%	21%	6%	-6%	6.6%	-18.2%	7.5%
Swisscanto (LU) Portfolio Fund Green Invest Balanced AA CHF	38%	35%	17%	-5%	7.3%	-19.9%	8.2%
Synchrony (CH) Balanced (CHF)	17%	15%	7%	-4%	7.0%	-16.3%	7.3%
TKB Vermoegensverwaltung - Ausgewogen (CHF) A			10%	-3%	7.1%	-17.7%	7.5%
UBS (Lux) Strategy Fund - Balanced (CHF) P-acc	17%	12%	1%	-9%	3.6%	-23.4%	8.9%
UBS (Lux) Strategy Xtra SICAV - Balanced (CHF) P-acc	12%	8%	2%	-7%	4.2%	-21.6%	7.1%
UBS (CH) Suisse - 45 (CHF) P-dist	34%	28%	8%	-5%	5.0%	-20.4%	7.4%
VP Bank Strategy Fund Balanced (CHF) C	11%	8%	6%	-7%	5.3%	-18.2%	6.8%
ZugerKB Fonds - Strategie Ausgewogen (CHF) B			9%	-6%	5.3%	-14.4%	7.8%
Zurich Invest II - Target Investment Fund 45 CHF B	33%	28%	10%	-4%	5.8%	-18.4%	7.9%

\* nach Fees, Ausschüttungen reinvestiert