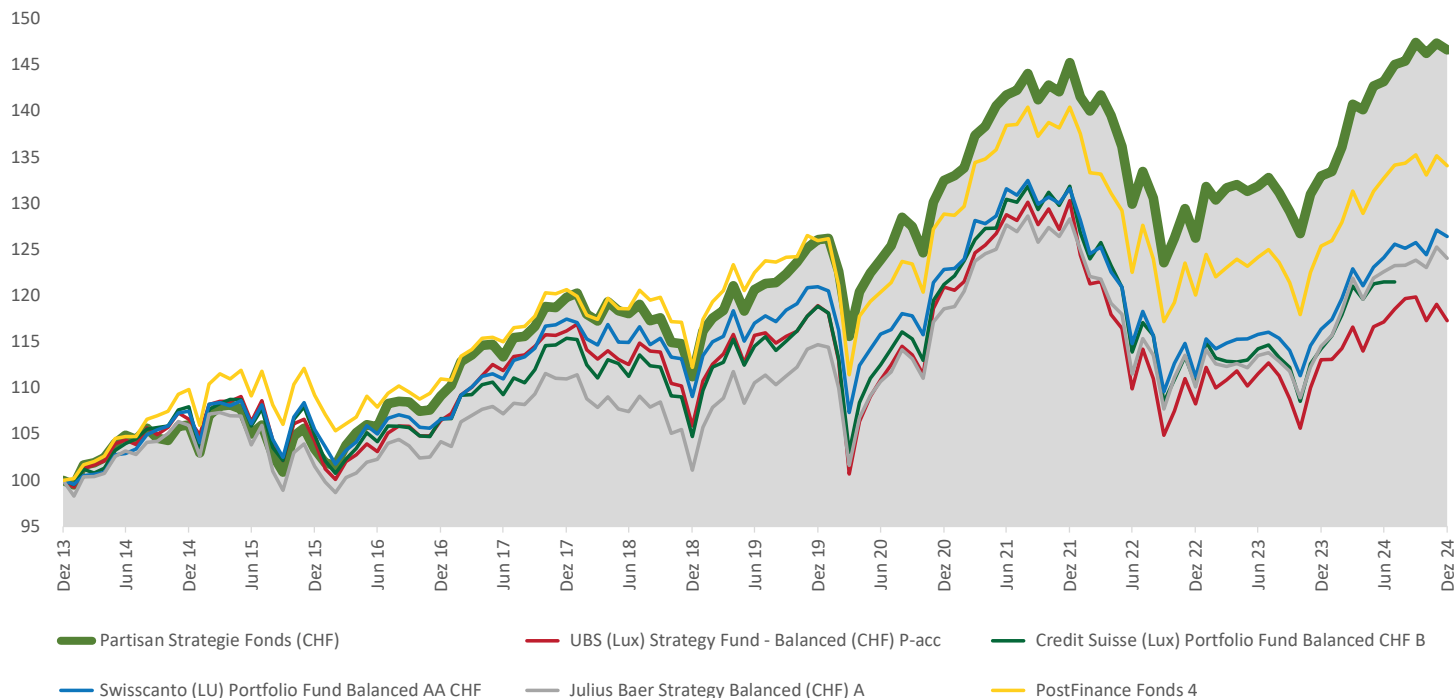


Der PARTISAN im Konkurrenzvergleich per

31.12.24

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)
Partisan Strategie Fonds (CHF)	47%	38%	16%	1%	10.3%	-15.8%	7.5%
Durchschnitt Vergleichsfonds	26%	18%	6%	-4%	7.4%	-18.4%	7.4%
AXA (CH) Strategy Fund – Portfolio 40 A	14%	9%	1%	-3%	4.2%	-10.1%	5.8%
BCV Stratégie Equipondéré Inc	28%	21%	8%	0%	9.2%	-17.6%	6.5%
BEKB Strategiefonds Ausgewogen - B			10%	0%	9.9%	-16.3%	7.1%
BKB Anlageloesung- Ausgewogen (CHF) B			9%	-2%	8.7%	-15.7%	7.3%
Clientis Fonds (CH) - Balanced A	20%	13%	3%	-5%	7.8%	-19.6%	7.1%
Credit Suisse (Lux) Portfolio Fund Balanced CHF B (bis 31.7.2024)	21%	13%	2%	-8%	6.4%	-20.6%	8.1%
Credit Suisse (Lux) IndexSelection Fund Balanced CHF B Acc	27%	20%	8%	-4%	6.1%	-22.0%	8.4%
Credit Suisse (CH) Interest & Dividend Focus Balanced CHF A	27%	16%	4%	-3%	5.9%	-26.0%	7.5%
Julius Baer Strategy Balanced (CHF) A	24%	17%	8%	-3%	8.3%	-19.2%	7.7%
LLB Strategie Ausgewogen (CHF)	17%	11%	2%	-4%	6.2%	-19.3%	7.9%
LO Funds (CH) - Balanced Allocation (CHF) P D	21%	14%	2%	-6%	10.7%	-21.4%	7.3%
LUKB Expert-Zuwachs	34%	25%	8%	0%	9.6%	-20.2%	7.3%
Migros Bank (CH) Fonds - Sustainable 45 A	36%	26%	8%	-3%	7.0%	-15.8%	7.2%
Migros Bank (Lux) Fonds - 50 A	33%	24%	7%	-3%	7.4%	-18.2%	7.2%
Pictet CH - LPP 40 R dy CHF	26%	16%	3%	-6%	7.5%	-14.6%	7.3%
PostFinance Fonds 4	34%	22%	6%	-5%	7.0%	-19.0%	8.2%
Raiffeisen Pension Invest Futura Balanced B	32%	19%	2%	-8%	6.5%	-17.5%	8.1%
Reichmuth Alpin Classic	22%	16%	0%	-7%	4.6%	-15.5%	7.4%
SGKB (CH) Fund – Strategie Ausgewogen A	32%	23%	9%	0%	9.1%	-20.4%	7.0%
SZKB Strategiefonds Ausgewogen A			14%	4%	11.6%	-16.9%	6.9%
Swiss Life Funds (CH) - Portfolio Global Balanced (CHF) A1	30%	18%	7%	-5%	8.0%	-17.6%	7.9%
Swisscanto (LU) Portfolio Fund Balanced AA CHF	26%	18%	5%	-4%	8.6%	-18.2%	7.4%
Swisscanto (LU) Portfolio Fund Green Invest Balanced AA CHF	39%	32%	13%	-6%	7.4%	-19.9%	8.0%
Synchrony (CH) Balanced (CHF)	19%	15%	6%	-3%	8.8%	-16.3%	7.2%
TKB Vermoegensverwaltung - Ausgewogen (CHF) A			8%	-3%	9.3%	-17.7%	7.4%
UBS (Lux) Strategy Fund - Balanced (CHF) P-acc	17%	10%	-1%	-10%	3.7%	-23.4%	8.8%
UBS (Lux) Strategy Xtra SICAV - Balanced (CHF) P-acc	12%	6%	0%	-9%	3.8%	-21.6%	7.0%
UBS (CH) Suisse - 45 (CHF) P-dist	36%	26%	7%	-4%	6.7%	-20.4%	7.4%
VP Bank Strategy Fund Balanced (CHF) C	12%	8%	4%	-6%	6.4%	-18.2%	6.7%
ZugerKB Fonds - Strategie Ausgewogen (CHF) B			7%	-6%	6.6%	-14.4%	7.7%
Zurich Invest II - Target Investment Fund 45 CHF B	35%	26%	8%	-4%	7.3%	-18.4%	7.8%

* nach Fees, Ausschüttungen reinvestiert