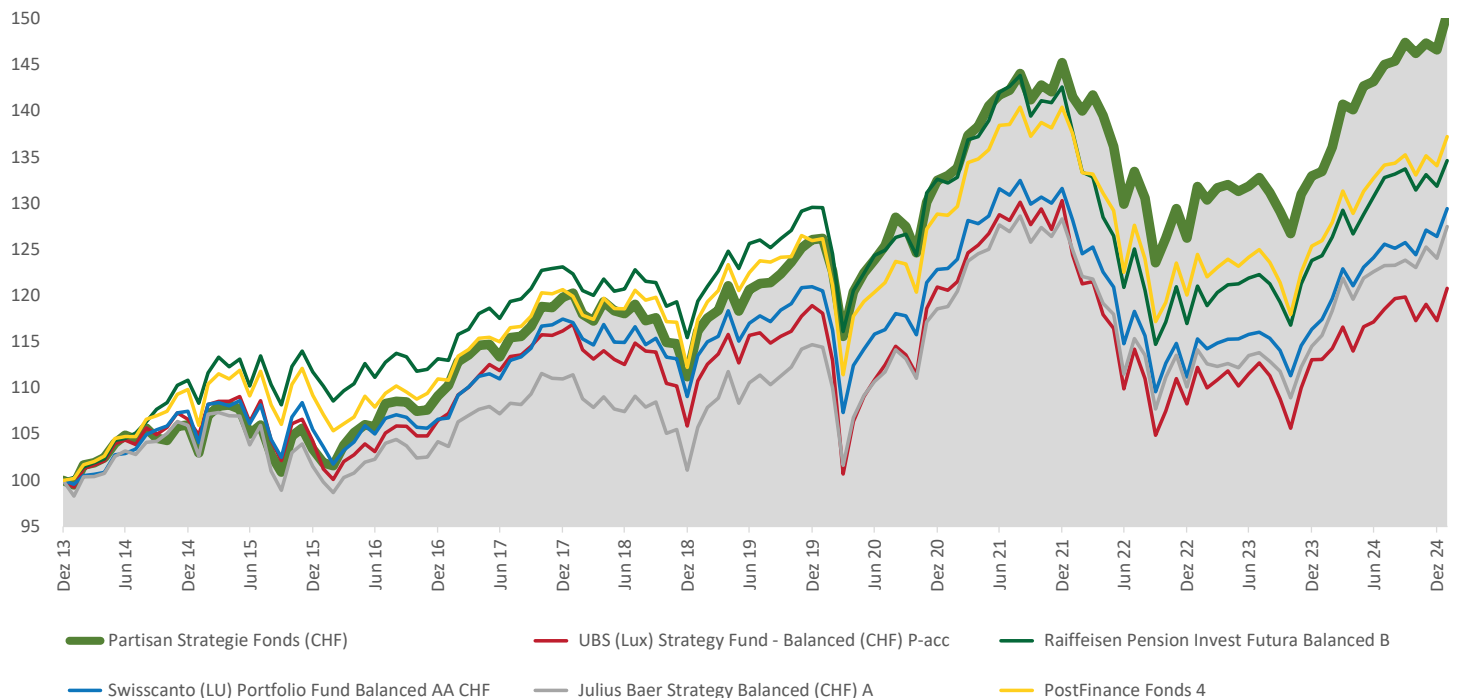


# Der PARTISAN im Konkurrenzvergleich per

31.01.25

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>51%</b>	<b>46%</b>	<b>19%</b>	<b>6%</b>	<b>2.7%</b>	<b>-15.8%</b>	<b>7.5%</b>
<b>Durchschnitt Vergleichsfonds</b>	<b>29%</b>	<b>25%</b>	<b>8%</b>	<b>1%</b>	<b>2.5%</b>	<b>-18.4%</b>	<b>7.4%</b>
AXA (CH) Strategy Fund – Portfolio 40 A	16%	10%	3%	1%	1.8%	-10.1%	5.8%
BCV Stratégie Equipondéré Inc	31%	29%	12%	5%	2.5%	-17.6%	6.5%
BEKB Strategiefonds Ausgewogen - B			12%	4%	2.3%	-16.3%	7.1%
BKB Anlageloesung- Ausgewogen (CHF) B			12%	4%	3.4%	-15.7%	7.3%
Clientis Fonds (CH) - Balanced A	25%	24%	7%	2%	3.4%	-19.6%	7.1%
Credit Suisse (Lux) Portfolio Fund Balanced CHF B (bis 31.7.2024)	21%	18%	3%	-4%	0.0%	-20.6%	8.1%
Credit Suisse (Lux) IndexSelection Fund Balanced CHF B Acc	31%	25%	11%	2%	2.9%	-22.0%	8.4%
Credit Suisse (CH) Interest & Dividend Focus Balanced CHF A	30%	23%	7%	0%	2.7%	-26.0%	7.5%
Julius Baer Strategy Balanced (CHF) A	27%	24%	11%	2%	2.8%	-19.2%	7.7%
LLB Strategie Ausgewogen (CHF)	19%	17%	5%	0%	2.3%	-19.3%	7.9%
LO Funds (CH) - Balanced Allocation (CHF) P D	24%	21%	4%	-1%	2.5%	-21.4%	7.3%
LUKB Expert-Zuwachs	37%	36%	11%	4%	2.5%	-20.2%	7.3%
Migros Bank (CH) Fonds - Sustainable 45 A	39%	32%	9%	2%	1.9%	-15.8%	7.2%
Migros Bank (Lux) Fonds - 50 A	37%	33%	10%	3%	2.8%	-18.2%	7.2%
Pictet CH - LPP 40 R dy CHF	28%	21%	4%	-1%	1.9%	-14.6%	7.3%
PostFinance Fonds 4	37%	29%	9%	0%	2.3%	-19.0%	8.2%
Raiffeisen Pension Invest Futura Balanced B	35%	24%	4%	-2%	2.1%	-17.5%	8.1%
Reichmuth Alpin Classic	26%	21%	3%	-3%	2.8%	-15.5%	7.4%
SGKB (CH) Fund – Strategie Ausgewogen A	36%	33%	13%	6%	3.4%	-20.4%	7.0%
SZKB Strategiefonds Ausgewogen A			16%	9%	2.1%	-16.9%	6.9%
Swiss Life Funds (CH) - Portfolio Global Balanced (CHF) A1	33%	27%	9%	1%	2.4%	-17.6%	7.9%
Swissscanto (LU) Portfolio Fund Balanced AA CHF	29%	24%	7%	1%	2.4%	-18.2%	7.4%
Swissscanto (LU) Portfolio Fund Green Invest Balanced AA CHF	42%	41%	15%	0%	2.5%	-19.9%	8.0%
Synchrony (CH) Balanced (CHF)	21%	22%	9%	2%	1.5%	-16.3%	7.2%
TKB Vermoegensverwaltung - Ausgewogen (CHF) A			12%	3%	3.1%	-17.7%	7.4%
UBS (Lux) Strategy Fund - Balanced (CHF) P-acc	21%	15%	2%	-3%	3.0%	-23.4%	8.8%
UBS (Lux) Strategy Xtra SICAV - Balanced (CHF) P-acc	15%	10%	3%	-3%	2.9%	-21.6%	7.0%
UBS (CH) Suisse - 45 (CHF) P-dist	40%	32%	9%	1%	2.7%	-20.4%	7.4%
VP Bank Strategy Fund Balanced (CHF) C	16%	13%	8%	0%	2.8%	-18.2%	6.7%
ZugerKB Fonds - Strategie Ausgewogen (CHF) B			8%	-1%	2.2%	-14.4%	7.7%
Zurich Invest II - Target Investment Fund 45 CHF B	39%	33%	11%	2%	2.6%	-18.4%	7.8%

\* nach Fees, Ausschüttungen reinvestiert