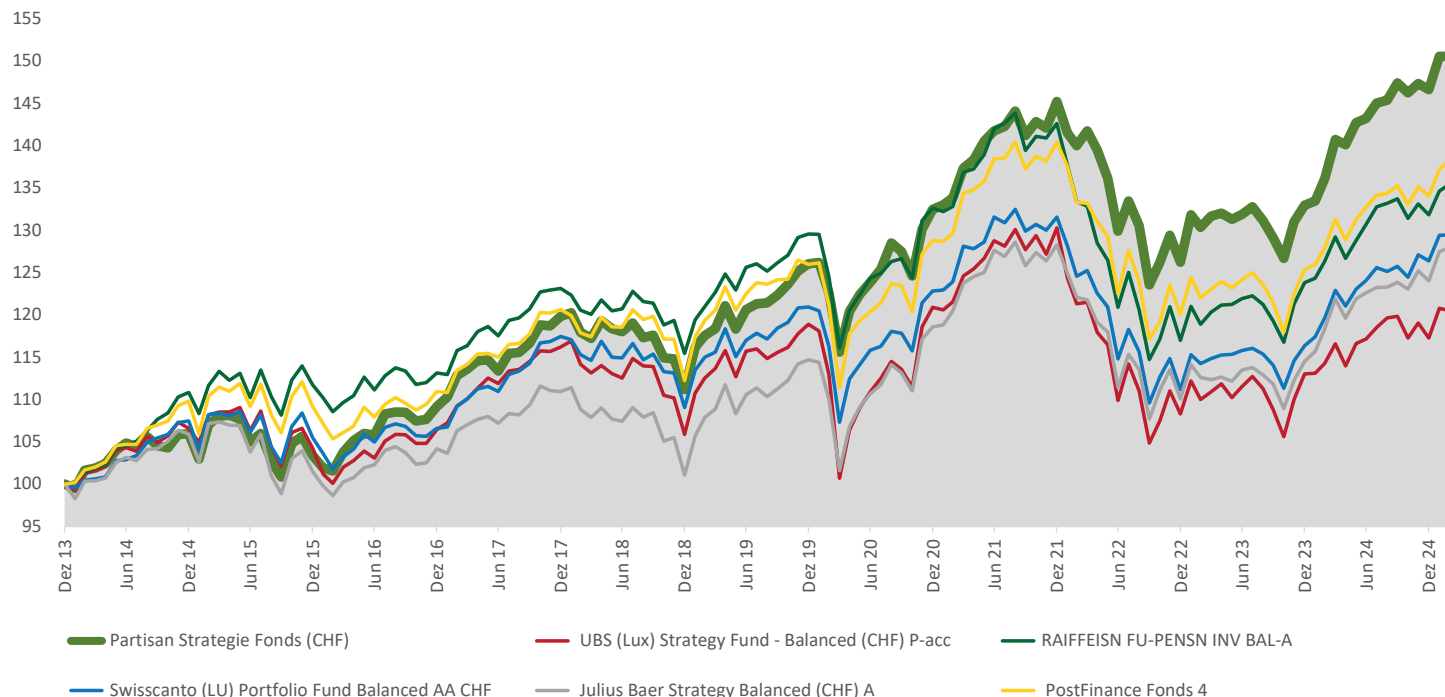


Der PARTISAN im Konkurrenzvergleich per

28.02.25

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)
Partisan Strategie Fonds (CHF)	51%	41%	23%	8%	2.7%	-15.8%	7.3%
Durchschnitt Vergleichsfonds	29%	20%	13%	4%	2.7%	-18.4%	7.3%
AXA (CH) Strategy Fund – Portfolio 40 A	16%	8%	7%	3%	1.9%	-10.1%	5.6%
BCV Stratégie Equipondéré Inc	31%	24%	16%	7%	2.2%	-17.6%	6.4%
BEKB Strategiefonds Ausgewogen - B			16%	8%	2.6%	-16.3%	7.1%
BKB Anlageloesung- Ausgewogen (CHF) B			15%	6%	3.4%	-15.7%	7.0%
Clientis Fonds (CH) - Balanced A	24%	19%	12%	5%	3.4%	-19.6%	6.9%
Credit Suisse (Lux) Portfolio Fund Balanced CHF B (bis 31.7.2024)	21%	13%	7%	-2%		-20.6%	7.6%
Credit Suisse (Lux) IndexSelection Fund Balanced CHF B Acc	31%	21%	16%	4%	2.6%	-22.0%	8.3%
Credit Suisse (CH) Interest & Dividend Focus Balanced CHF A	31%	20%	15%	4%	3.6%	-26.0%	7.6%
Julius Baer Strategy Balanced (CHF) A	28%	19%	16%	5%	3.1%	-19.2%	7.6%
LLB Strategie Ausgewogen (CHF)	20%	13%	9%	3%	2.9%	-19.3%	7.8%
LO Funds (CH) - Balanced Allocation (CHF) P D	24%	17%	8%	2%	2.5%	-21.4%	7.0%
LUKB Expert-Zuwachs	38%	29%	16%	7%	2.7%	-20.2%	7.3%
Migros Bank (CH) Fonds - Sustainable 45 A	39%	27%	13%	5%	2.2%	-15.8%	6.9%
Migros Bank (Lux) Fonds - 50 A	38%	28%	15%	6%	3.4%	-18.2%	7.1%
Pictet CH - LPP 40 R dy CHF	28%	17%	7%	2%	1.9%	-14.6%	7.2%
PostFinance Fonds 4	38%	25%	14%	4%	3.1%	-19.0%	8.1%
Raiffeisen Pension Invest Futura Balanced B	35%	21%	9%	1%	2.7%	-17.5%	7.9%
Reichmuth Alpin Classic	26%	17%	7%	0%	3.4%	-15.5%	7.4%
SGKB (CH) Fund – Strategie Ausgewogen A	37%	27%	18%	10%	3.6%	-20.4%	6.8%
SZKB Strategiefonds Ausgewogen A			20%	11%	2.3%	-16.9%	6.7%
Swiss Life Funds (CH) - Portfolio Global Balanced (CHF) A1	33%	24%	14%	4%	2.9%	-17.6%	7.6%
Swisscanto (LU) Portfolio Fund Balanced AA CHF	29%	20%	11%	4%	2.4%	-18.2%	7.4%
Swisscanto (LU) Portfolio Fund Green Invest Balanced AA CHF	41%	34%	18%	2%	1.8%	-19.9%	7.9%
Synchrony (CH) Balanced (CHF)	20%	17%	12%	4%	1.1%	-16.3%	7.0%
TKB Vermögensverwaltung - Ausgewogen (CHF) A		26%	16%	6%	3.1%	-17.7%	7.3%
UBS (Lux) Strategy Fund - Balanced (CHF) P-acc	21%	11%	7%	-1%	2.8%	-23.4%	8.5%
UBS (Lux) Strategy Xtra SICAV - Balanced (CHF) P-acc	16%	8%	8%	-1%	3.4%	-21.6%	6.9%
UBS (CH) Suisse - 45 (CHF) P-dist	41%	27%	14%	4%	3.2%	-20.4%	7.3%
VP Bank Strategy Fund Balanced (CHF) C	15%	10%	10%	2%	2.6%	-18.2%	6.5%
ZugerKB Fonds - Strategie Ausgewogen (CHF) B			11%	1%	1.8%	-14.4%	7.5%
Zurich Invest II - Target Investment Fund 45 CHF B	39%	29%	15%	5%	3.1%	-18.4%	7.7%

* nach Fees, Ausschüttungen reinvestiert