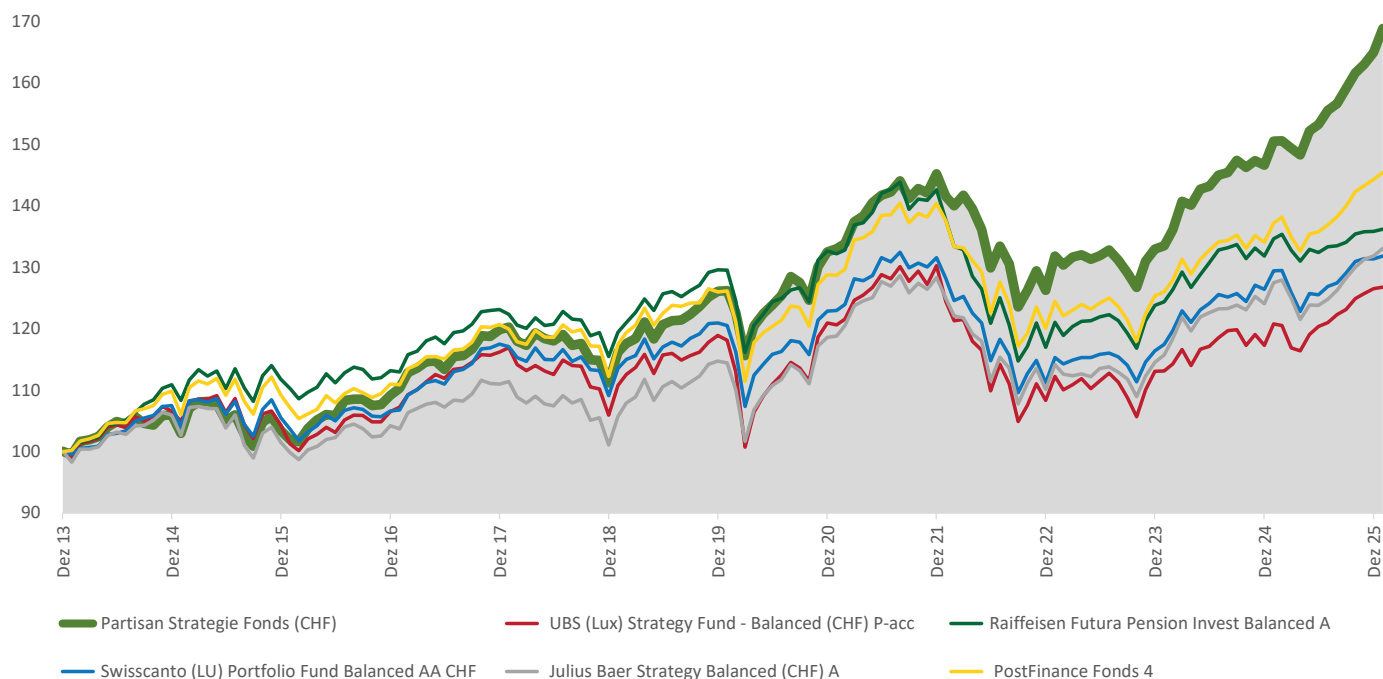


# Der PARTISAN im Konkurrenzvergleich per 31.01.26

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>69%</b>	<b>66%</b>	<b>27%</b>	<b>28%</b>	<b>2.4%</b>	<b>-15.8%</b>	<b>5.0%</b>
<b>Durchschnitt Vergleichsfonds</b>	<b>34%</b>	<b>32%</b>	<b>11%</b>	<b>16%</b>	<b>0.7%</b>	<b>-18.4%</b>	<b>5.0%</b>
AXA (CH) Strategy Fund – Portfolio 40 A	19%	15%	7%	14%	0.6%	-10.1%	4.2%
BCV Stratégie Equipondéré Inc	37%	35%	16%	19%	1.0%	-17.6%	4.5%
BEKB Strategiefonds Ausgewogen - B		36%	14%	20%	0.8%	-16.3%	4.5%
BKB Anlageloesung- Ausgewogen (CHF) B		44%	14%	18%	0.6%	-15.7%	4.6%
Clientis Fonds (CH) - Balanced A	33%	32%	12%	20%	0.9%	-19.6%	4.8%
UBS Lux Systematic Index Fund Balanced CHF B (ex CS)	38%	36%	16%	16%	1.1%	-22.0%	5.8%
UBS Swiss & Global Income Strategy - Balanced CHF (ex CS)	34%	29%	13%	10%	0.1%	-26.0%	5.6%
Julius Baer Strategy Balanced (CHF) A	33%	33%	12%	17%	0.9%	-19.2%	5.4%
LLB Strategie Ausgewogen (CHF)	26%	25%	11%	16%	0.6%	-19.3%	4.9%
LO Funds (CH) - Balanced Allocation (CHF) P D	28%	26%	6%	15%	0.6%	-21.4%	5.3%
LUKB Expert-Zuwachs	44%	41%	16%	19%	1.0%	-20.2%	5.0%
Migros Bank (CH) Fonds - Sustainable 45 A	44%	34%	11%	15%	0.9%	-15.8%	4.3%
Migros Bank (Lux) Fonds - 50 A	41%	35%	12%	15%	0.4%	-18.2%	4.6%
Pictet CH - LPP 40 R dy CHF	30%	22%	3%	14%	0.6%	-14.6%	5.0%
PostFinance Fonds 4	45%	36%	13%	17%	0.8%	-19.0%	5.5%
Raiffeisen Pension Invest Futura Balanced B	36%	24%	3%	13%	0.3%	-17.5%	5.0%
Reichmuth Alpin Classic	35%	29%	9%	16%	1.3%	-15.5%	4.8%
SGKB (CH) Fund – Strategie Ausgewogen A	43%	41%	17%	19%	1.0%	-20.4%	4.6%
SZKB Strategiefonds Ausgewogen A		44%	19%	24%	0.2%	-16.9%	4.6%
Swiss Life Funds (CH) - Portfolio Global Balanced (CHF) A1	36%	32%	11%	15%	0.2%	-17.6%	5.3%
Swisscanto (LU) Portfolio Fund Balanced AA CHF	32%	27%	7%	14%	0.3%	-18.2%	5.1%
Swisscanto (LU) Portfolio Fund Green Invest Balanced AA CHF	44%	43%	6%	11%	0.6%	-19.9%	5.4%
Synchrony (CH) Balanced (CHF)	21%	23%	6%	11%	0.3%	-16.3%	4.5%
TKB Vermoegensverwaltung - Ausgewogen (CHF) A		40%	16%	21%	1.0%	-17.7%	5.1%
UBS (Lux) Strategy Fund - Balanced (CHF) P-acc	27%	25%	5%	13%	0.2%	-23.4%	6.0%
UBS (Lux) Strategy Xtra SICAV - Balanced (CHF) P-acc	22%	21%	7%	12%	0.6%	-21.6%	4.7%
UBS (CH) Suisse - 45 (CHF) P-dist	48%	38%	13%	17%	1.0%	-20.4%	4.8%
VP Bank Strategy Fund Balanced (CHF) C	21%	24%	8%	15%	1.2%	-18.2%	4.6%
ZugerKB Fonds - Strategie Ausgewogen (CHF) B		41%	6%	15%	0.4%	-14.4%	5.0%
Zurich Invest II - Target Investment Fund 45 CHF B	43%	36%	11%	16%	0.4%	-18.4%	5.0%

\* nach Fees, Ausschüttungen reinvestiert

Quelle: Bloomberg