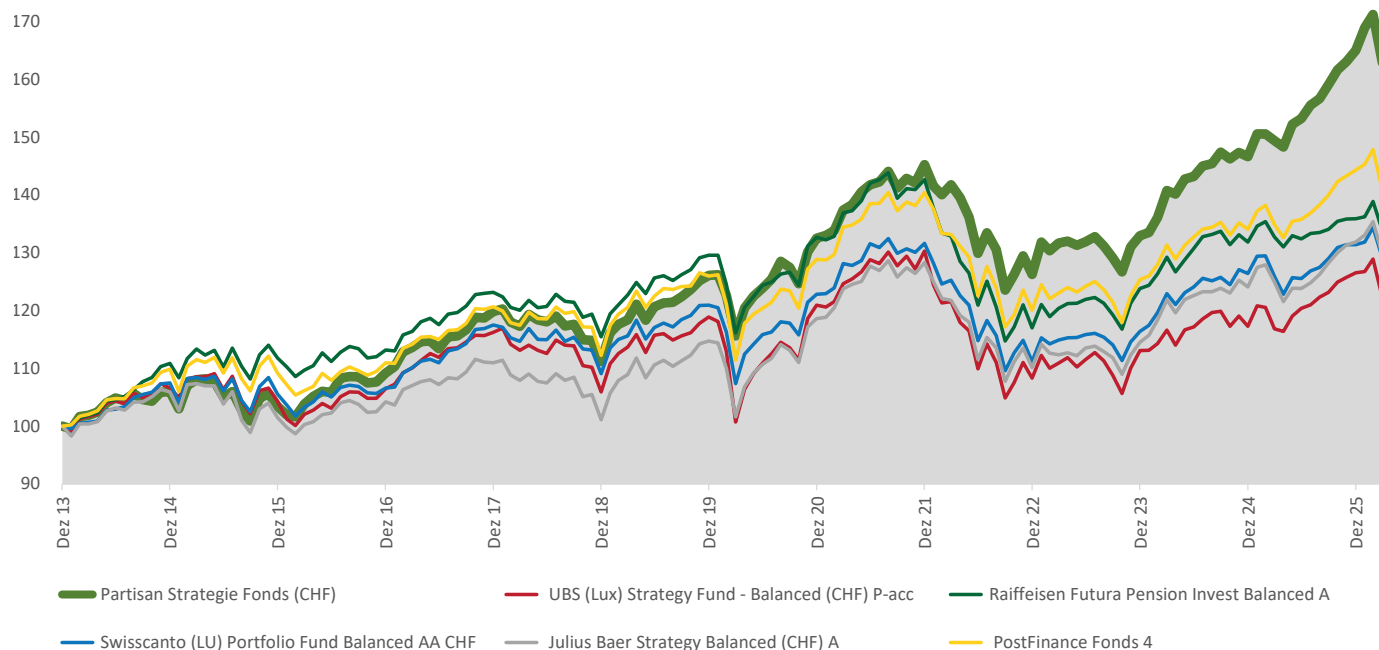


Der PARTISAN im Konkurrenzvergleich per 31.03.26

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)
Partisan Strategie Fonds (CHF)	63%	57%	19%	24%	-1.3%	-15.8%	5.4%
Durchschnitt Vergleichsfonds	31%	29%	4%	14%	-1.7%	-18.4%	5.3%
AXA (CH) Strategy Fund – Portfolio 40 A	17%	13%	2%	11%	-1.5%	-10.1%	4.7%
BCV Stratégie Equipondéré Inc	34%	33%	8%	16%	-1.6%	-17.6%	5.0%
BEKB Strategiefonds Ausgewogen - B		33%	8%	18%	-1.3%	-16.3%	4.9%
BKB Anlageloesung- Ausgewogen (CHF) B		42%	8%	16%	-1.4%	-15.7%	5.3%
Clientis Fonds (CH) - Balanced A	31%	31%	7%	18%	-1.1%	-19.6%	5.2%
UBS Lux Systematic Index Fund Balanced CHF B (ex CS)	34%	32%	8%	14%	-1.5%	-22.0%	5.9%
UBS Swiss & Global Income Strategy - Balanced CHF (ex CS)	31%	25%	4%	10%	-1.7%	-26.0%	5.5%
Julius Baer Strategy Balanced (CHF) A	30%	29%	5%	15%	-1.7%	-19.2%	5.7%
LLB Strategie Ausgewogen (CHF)	21%	21%	4%	13%	-2.7%	-19.3%	5.1%
LO Fonds (CH) - Balanced Allocation (CHF) P D	23%	23%	0%	13%	-2.7%	-21.4%	5.7%
LUKB Expert-Zuwachs	42%	40%	9%	18%	-0.7%	-20.2%	5.4%
Migros Bank (CH) Fonds - Sustainable 45 A	40%	32%	5%	13%	-1.4%	-15.8%	4.6%
Migros Bank (Lux) Fonds - 50 A	39%	34%	6%	13%	-1.4%	-18.2%	4.8%
Pictet CH - LPP 40 R dy CHF	27%	20%	-2%	12%	-1.7%	-14.6%	5.0%
PostFinance Fonds 4	41%	33%	5%	14%	-2.4%	-19.0%	5.9%
Raiffeisen Pension Invest Futura Balanced B	34%	22%	-2%	11%	-1.5%	-17.5%	5.2%
Reichmuth Alpin Classic	31%	25%	3%	14%	-1.1%	-15.5%	5.1%
SGKB (CH) Fund – Strategie Ausgewogen A	41%	38%	11%	18%	-0.3%	-20.4%	4.7%
SZKB Strategiefonds Ausgewogen A		41%	13%	21%	-2.3%	-16.9%	4.9%
Swiss Life Fonds (CH) - Portfolio Global Balanced (CHF) A1	33%	30%	4%	13%	-2.3%	-17.6%	5.7%
Swisscanto (LU) Portfolio Fund Balanced AA CHF	29%	25%	1%	12%	-1.7%	-18.2%	5.4%
Swisscanto (LU) Portfolio Fund Green Invest Balanced AA CHF	41%	39%	-1%	10%	-1.6%	-19.9%	5.6%
Synchrony (CH) Balanced (CHF)	20%	22%	1%	11%	-0.7%	-16.3%	4.3%
TKB Vermögensverwaltung - Ausgewogen (CHF) A		37%	9%	19%	-1.5%	-17.7%	5.4%
UBS (Lux) Strategy Fund - Balanced (CHF) P-acc	22%	20%	-2%	10%	-3.4%	-23.4%	6.5%
UBS (Lux) Strategy Xtra SICAV - Balanced (CHF) P-acc	18%	17%	0%	10%	-2.7%	-21.6%	5.4%
UBS (CH) Suisse - 45 (CHF) P-dist	43%	34%	6%	14%	-2.3%	-20.4%	5.4%
VP Bank Strategy Fund Balanced (CHF) C	18%	20%	2%	13%	-1.5%	-18.2%	4.9%
ZugerKB Fonds - Strategie Ausgewogen (CHF) B		34%	1%	12%	-3.0%	-14.4%	5.4%
Zurich Invest II - Target Investment Fund 45 CHF B	40%	34%	4%	13%	-1.9%	-18.4%	5.2%

* nach Fees, Ausschüttungen reinvestiert

Quelle: Bloomberg