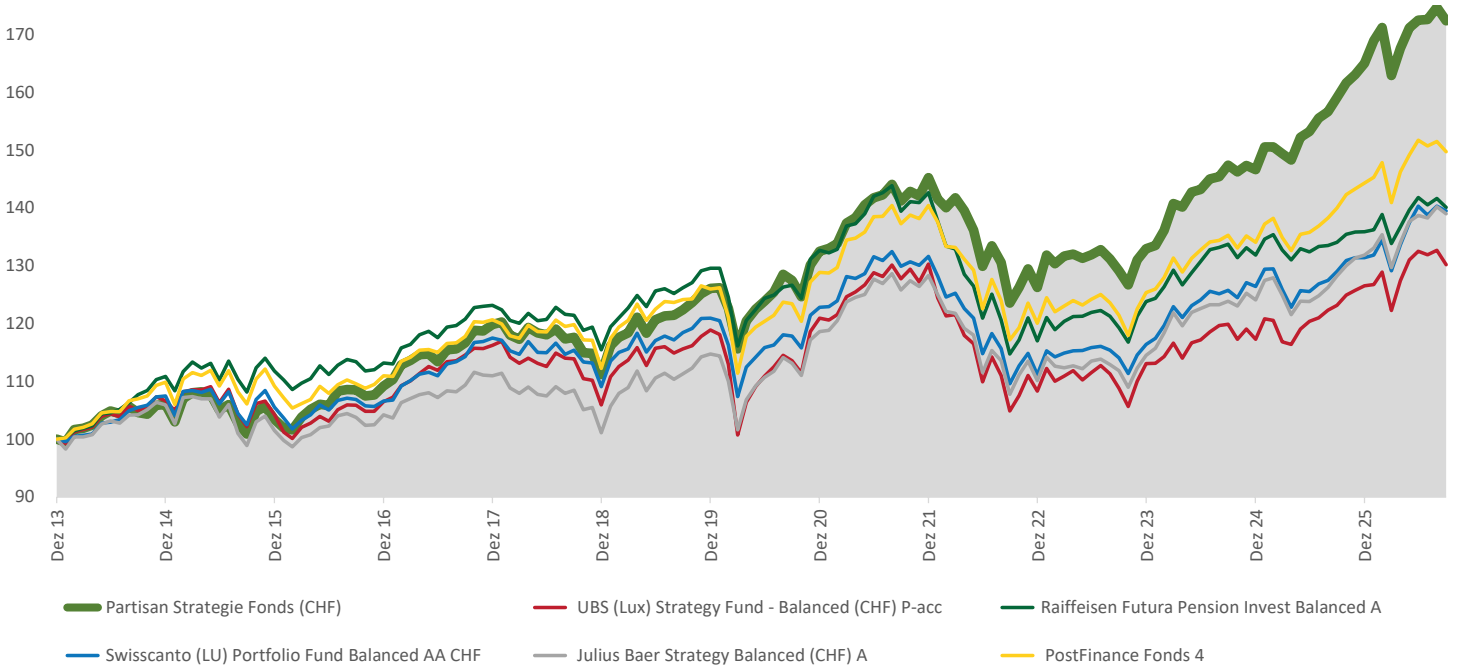
Der PARTISAN im Konkurrenzvergleich per 30.09.26

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)	**72%**	**59%**	**22%**	**33%**	**4.5%**	**-15.8%**	**5.6%**
Durchschnitt Vergleichsfonds	**39%**	**33%**	**9%**	**22%**	**4.6%**	**-18.4%**	**5.7%**
AXA (CH) Strategy Fund – Portfolio 40 A	20%	16%	4%	14%	1.9%	-10.1%	4.9%
BCV Stratégie Equipondéré Inc	42%	37%	13%	23%	4.3%	-17.6%	5.3%
BEKB Strategiefonds Ausgewogen - B		38%	12%	25%	4.7%	-16.3%	5.2%
BKB Anlageloesung- Ausgewogen (CHF) B		46%	13%	26%	5.8%	-15.7%	5.6%
Clientis Fonds (CH) - Balanced A	40%	36%	13%	28%	6.0%	-19.6%	5.5%
UBS Lux Systematic Index Fund Balanced CHF B (ex CS)	45%	37%	12%	25%	6.0%	-22.0%	6.2%
UBS Swiss & Global Income Strategy - Balanced CHF (ex CS)	41%	29%	10%	20%	5.6%	-26.0%	5.7%
Julius Baer Strategy Balanced (CHF) A	39%	34%	10%	24%	5.4%	-19.2%	6.0%
LLB Strategie Ausgewogen (CHF)	29%	24%	8%	21%	3.7%	-19.3%	5.5%
LO Funds (CH) - Balanced Allocation (CHF) P D	32%	28%	4%	24%	4.3%	-21.4%	6.0%
LUKB Expert-Zuwachs	51%	45%	14%	27%	5.5%	-20.2%	5.6%
Migros Bank (CH) Fonds - Sustainable 45 A	49%	36%	9%	20%	4.8%	-15.8%	5.0%
Migros Bank (Lux) Fonds - 50 A (liquidiert per 31.7.2026)						-18.2%	
Pictet CH - LPP 40 R dy CHF	35%	23%	3%	19%	4.2%	-14.6%	5.4%
PostFinance Fonds 4	50%	37%	9%	23%	3.8%	-19.0%	6.3%
Raiffeisen Pension Invest Futura Balanced B	40%	24%	0%	17%	3.1%	-17.5%	5.4%
Reichmuth Alpin Classic	39%	26%	7%	23%	4.6%	-15.5%	5.3%
SGKB (CH) Fund – Strategie Ausgewogen A	51%	43%	17%	27%	6.9%	-20.4%	4.9%
SZKB Strategiefonds Ausgewogen A		47%	19%	27%	4.8%	-16.9%	5.3%
Swiss Life Funds (CH) - Portfolio Global Balanced (CHF) A1	41%	34%	7%	21%	3.8%	-17.6%	6.1%
Swisscanto (LU) Portfolio Fund Balanced AA CHF	39%	31%	7%	22%	6.2%	-18.2%	6.0%
Swisscanto (LU) Portfolio Fund Green Invest Balanced AA CHF	52%	45%	5%	20%	6.6%	-19.9%	6.5%
Synchrony (CH) Balanced (CHF)	28%	28%	6%	19%	5.9%	-16.3%	4.5%
TKB Vermoegensverwaltung - Ausgewogen (CHF) A		42%	15%	28%	5.7%	-17.7%	5.7%
UBS (Lux) Strategy Fund - Balanced (CHF) P-acc	30%	23%	2%	20%	2.9%	-23.4%	6.9%
UBS (Lux) Strategy Xtra SICAV - Balanced (CHF) P-acc	26%	22%	4%	19%	3.9%	-21.6%	6.0%
UBS (CH) Suisse - 45 (CHF) P-dist	50%	35%	8%	20%	2.7%	-20.4%	5.9%
VP Bank Strategy Fund Balanced (CHF) C	24%	23%	6%	20%	3.4%	-18.2%	5.1%
ZugerKB Fonds - Strategie Ausgewogen (CHF) B		36%	5%	22%	3.6%	-14.4%	5.9%
Zurich Invest II - Target Investment Fund 45 CHF B	49%	37%	8%	21%	4.3%	-18.4%	5.5%

* nach Fees, Ausschüttungen reinvestiert

Quelle: Bloomberg