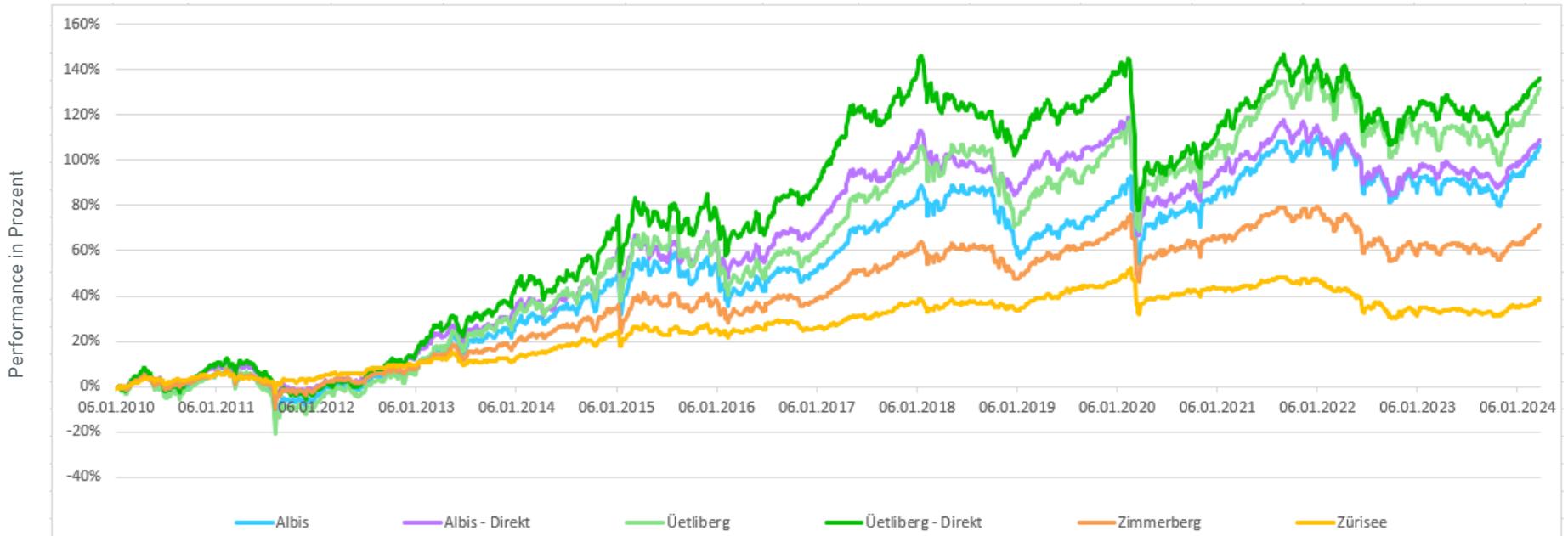


KUMULIERTE PERFORMANCE BKT-VERMÖGENSVERWALTUNGSMANDATE PER 29.03.2024



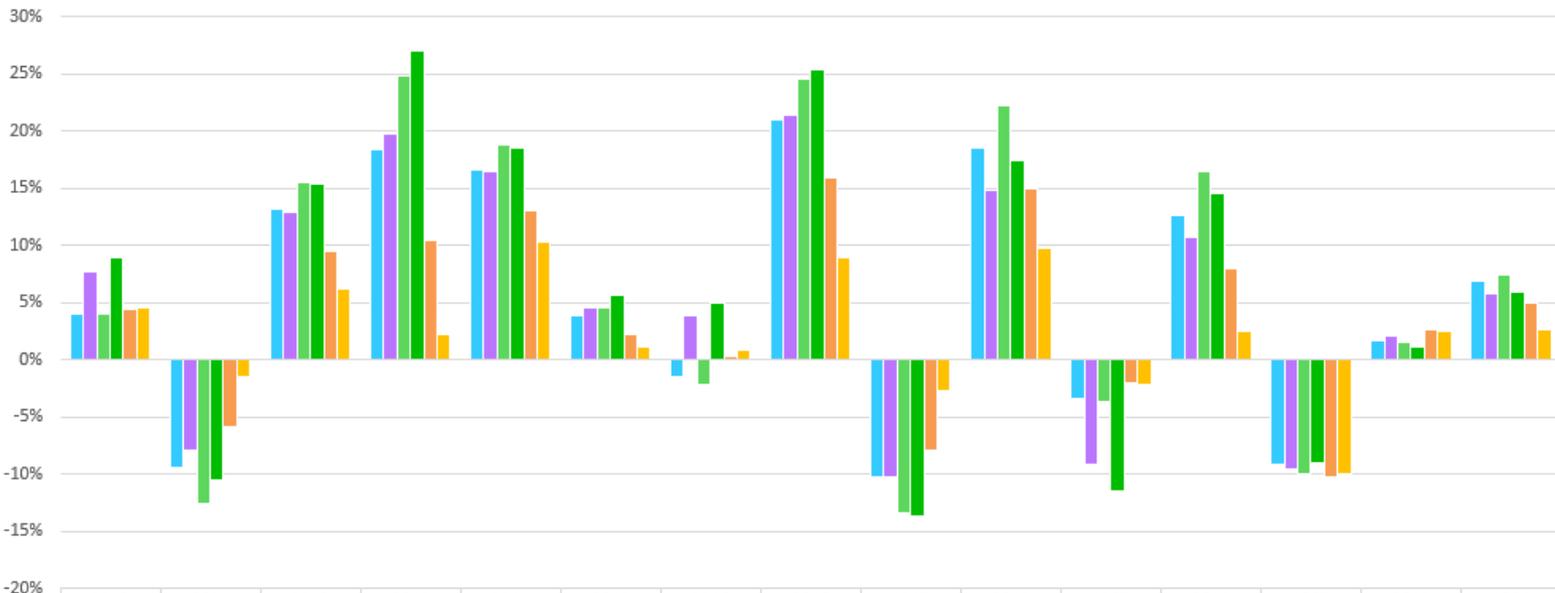
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DATEN BIS UND MIT 2018 AUS BACKTESTING

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JÄHRLICHE PERFORMANCE BKT-VERMÖGENSVERWALTUNGSMANDATE PER 29.03.2024

Performance in Prozent



	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
■ Albis	4.0%	-9.3%	13.1%	18.4%	16.6%	3.9%	-1.5%	21.0%	-10.2%	18.6%	-3.4%	12.7%	-9.1%	1.7%	6.9%
■ Albis - Direkt	7.7%	-7.9%	12.9%	19.7%	16.5%	4.6%	3.9%	21.3%	-10.2%	14.9%	-9.1%	10.7%	-9.5%	2.1%	5.8%
■ Üetliberg	4.0%	-12.6%	15.6%	24.8%	18.7%	4.6%	-2.2%	24.5%	-13.4%	22.2%	-3.7%	16.5%	-10.0%	1.6%	7.5%
■ Üetliberg - Direkt	8.9%	-10.5%	15.3%	27.0%	18.5%	5.7%	5.0%	25.4%	-13.7%	17.5%	-11.4%	14.5%	-9.0%	1.1%	6.0%
■ Zimmerberg	4.4%	-5.9%	9.5%	10.5%	13.0%	2.3%	0.3%	15.9%	-7.9%	14.9%	-2.0%	7.9%	-10.2%	2.7%	5.0%
■ Zürisee	4.6%	-1.4%	6.2%	2.3%	10.3%	1.1%	0.8%	8.9%	-2.6%	9.8%	-2.1%	2.5%	-9.9%	2.5%	2.7%

* DATEN BIS UND MIT 2018 AUS BACKTESTING

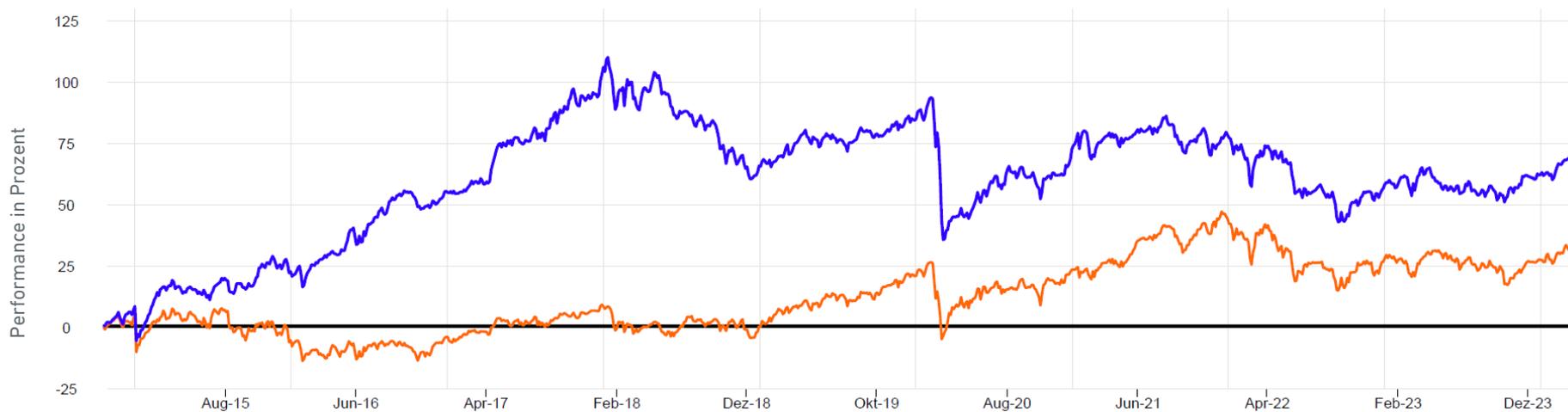
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KUMULIERTE PERFORMANCE BKT-AKTIENMANDAT VS. SMI PER 29.03.2024

Jährlicher Vergleich

Portfolio SMI



	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Portfolio	5,7%	20,4%	19,5%	27,2%	-16,6%	13,4%	-9,9%	7,0%	-13,7%	4,8%	7,0%
SMI	1,7%	-1,8%	-6,8%	14,1%	-10,2%	26,0%	0,8%	20,3%	-16,7%	3,8%	5,3%

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