






Performance of Moventum Portfolios Europe*

More than **16 Years**
Moventum
Portfolio Services

EUR performance in percent as per 31/08/2020

Name	Year-to-date	Since launch date 01/01/2003	Annual return on average since launch date	Volatility p.a. since launch date
Private Wealth** 	1.38	30.16	3.21	3.77
Global Defensive*** 	3.38	96.95	3.91	5.20
Global Balanced 	3.40	136.14	4.98	8.09
Global Dynamic 	3.75	206.27	6.54	10.62
Global Growth 	5.07	254.18	7.42	13.60

■ Equity funds ■ Bond funds ■ Multi Assets

Past performance is no guarantee of future results. The value of investments is subject to price fluctuations.
Source: FondsConsult Research AG

* Performance prior to costs of purchase (BVI method) and based on compounded interest.
** Portfolio Launch 01/05/2012.
*** Percentage of stocks has been increased from 20% to 30% on 01/04/2007.

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Name	2019	2018	2017	2016	2015	2014	2013	2012**	2011	2010	2009	2008	2007	2006	2005	2004	2003
Private Wealth** 	9,88	-5,54	2,99	2,05	5,12	3,79	6,24	1,49									
Global Defensive*** 	11,90	-4,92	3,90	1,12	4,53	5,59	8,40	10,60	-2,95	8,47	11,11	-13,25	1,23	2,48	7,94	5,51	7,44
Global Balanced 	15,90	-6,85	5,83	2,84	6,77	8,22	12,05	12,31	-8,22	13,64	17,36	-26,16	1,86	4,63	15,81	7,99	10,95
Global Dynamic 	19,87	-7,44	7,29	4,31	9,63	11,44	17,57	14,66	-10,50	17,66	23,40	-32,75	2,61	6,09	22,52	10,08	12,44
Global Growth 	24,85	-8,15	7,58	5,61	12,51	15,02	22,60	14,60	-12,55	21,13	28,79	-42,66	3,06	8,22	28,19	11,10	14,53

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