





## Performance of Momentum Portfolios\*

Marketing communication

USD performance in percent as per 31/3/2025

Asset Management	Year-to-date	Since launch date 01/01/2015	Annual return on average since launch date	Volatility p.a. since launch date
Global Defensive 	0,61	48,93	3,96	6,50
Global Balanced 	-0,18	62,60	4,86	8,99
Global Dynamic 	-1,05	78,82	5,84	11,54
Global Growth 	-2,29	103,22	7,16	14,88





Please note the information on page 3.

■ Equity funds ■ Bond funds

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

\* Performance according to BVI method

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Asset Management		2024	2023	2022	2021	2020	2019	2018	2017	2016	2015
Global Defensive		7,81	11,34	-11,89	3,79	12,91	11,51	-3,35	8,02	3,14	-0,53
Global Balanced		9,68	13,34	-14,90	6,45	15,77	15,47	-6,27	12,17	4,31	-1,35
Global Dynamic		11,37	15,42	-17,42	10,10	19,06	18,55	-8,40	15,89	4,71	-1,43
Global Growth		14,00	18,46	-21,43	15,33	26,32	22,22	-11,23	19,49	4,65	-0,84

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