





Performance of Momentum Portfolios*

Marketing communication

USD performance in percent as per 31/10/2024

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 	7,59	47,73	4,05	6,38
Global Balanced 	9,67	62,88	5,09	8,79
Global Dynamic 	11,59	81,08	6,22	11,26
Global Growth 	14,51	108,92	7,78	14,51

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	2023	2022	2021	2020	2019	2018	2017	2016	2015
Global Defensive 	11.34	-11,89	3,79	12,91	11,31	-3,44	8,19	3,07	-0,52
Global Balanced 	13.34	-14,90	6,45	15,78	15,08	-6,17	12,12	4,08	-1,35
Global Dynamic 	15.42	-17,42	10,12	19,03	17,84	-8,00	15,38	4,48	-1,41
Global Growth 	18.46	-21,43	15,37	26,28	21,06	-10,50	18,66	4,37	-0,84

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