






## Performance of Momentum Portfolios Europe<sup>1</sup>

Marketing communication

Asset Management	performance in percent as per <b>30/04/2025</b>			
	Year-to-date	Since launch date <sup>2</sup> 01/01/2003	Annual return on average since launch date	Volatility p.a.. since launch date
<b>Private Wealth</b> 	-0,11	45,86	2,95	3,75
<b>Global Defensive</b> <sup>3</sup> 	-1,14	122,94	3,66	5,42
<b>Global Balanced</b> 	-2,77	180,38	4,73	8,07
<b>Global Dynamic</b> 	-5,18	291,56	6,30	10,48
<b>Global Growth</b> 	-8,22	393,01	7,41	13,42

Please note the information on page 3.

■ Equity funds ■ Bond funds ■ Multi Asset

Past performance is no guarantee of future results.

The value of investments is subject to price fluctuations. / Source: Morningstar Direct

<sup>1</sup> Performance prior to costs of purchase (BVI method) and based on compounded interest.

<sup>2</sup> Portfolio Launch 01/05/2012.

<sup>3</sup> Percentage of stocks has been increased from 20% to 30% on 01/04/2007.

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Asset Management	2024	2023	2022	2021	2020	2019	2018	2017	2016	2015	2014	2013	2012	2011	2010	2009	2008	2007	2006	2005	2004
<b>Private Wealth</b>	8,10	6,84	-8,02	1,88	4,95	9,88	-5,43	3,00	2,05	5,12	3,84	6,24									
<b>Global Defensive</b> <sup>3</sup>	6,90	9,33	-13,06	6,31	9,50	11,90	-4,87	3,91	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
<b>Global Balanced</b>	9,25	10,41	-14,53	10,16	11,03	15,90	-6,74	5,85	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
<b>Global Dynamic</b>	13,13	11,97	-14,76	15,14	12,40	19,90	-7,35	7,31	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
<b>Global Growth</b>	18,16	14,45	-16,94	22,52	15,57	24,85	-7,99	7,59	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

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