






Performance of Momentum Portfolios Europe¹

Marketing communication

Asset Management	performance in percent as per 31/03/2025			
	Year-to-date	Since launch date ² 01/01/2003	Annual return on average since launch date	Volatility p.a.. since launch date
Private Wealth 	0,62	46,93	3,02	3,77
Global Defensive ³ 	-0,57	124,23	3,70	5,43
Global Balanced 	-1,25	184,76	4,82	8,08
Global Dynamic 	-2,51	302,62	6,46	10,47
Global Growth 	-4,24	414,37	7,64	13,41

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






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

² Portfolio Launch 01/05/2012.

³ 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
Private Wealth 	8,10	6,84	-8,02	1,88	4,95	9,88	-5,43	3,00	2,05	5,12	3,84	6,24									
Global Defensive ³ 	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
Global Balanced 	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
Global Dynamic 	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
Global Growth 	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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