

Anlagepläne Rankings 31.03.2024

Bonds CHF				Bonds EUR			
	Valor	Rendite (%) in CHF 01.04.2021 31.03.2024	Rang		Valor	Rendite (%) in CHF 01.04.2021 31.03.2024	Rang
Benchmark 1: SIX SBI Dom Gvt 3-7 Yr TR CHF				Benchmark 1: Markit iBoxx EUR Corp 5-7 TR			
SWC (CH) BF Resp Corporate CHF AA CHF	277'966	-3.87	1	Franklin European Ttl Ret A(acc)EUR	1'628'269	-19.51	1
LO Funds (CH) Swiss Franc Credit Bond PD	11'677'118	-3.96	2	CT(Lux) Eurp SciBd AE EUR Acc	54'626'397	-20.55	2
Pictet-CHF Bonds P	1'297'658	-4.34	3	Amundi Fds Euro Aggt Bd A EUR C	12'816'851	-23.41	3
UBS Bond (CHF) Flexible P-acc	595'735	-5.03	4	BGF Euro Bond A2	226'677	-23.62	4
CS (CH) Global Corp Bd Fd BH CHF	39'364'170	-13.30	5	Pictet - EUR Bonds P	1'226'052	-28.14	5

Bonds USD				Bonds Emerging Markets			
	Valor	Rendite (%) in CHF 01.04.2021 31.03.2024	Rang		Valor	Rendite (%) in CHF 01.04.2021 31.03.2024	Rang
Benchmark 1: Bloomberg US Agg Bond TR USD				Benchmark 1: Bloomberg EM USD Aggregate TR USD			
BGF Fixed Income Global Opps A2	2'832'768	-3.93	1	BGF Sustainable EM Lcl Ccy Bd A2 USD	43'002'746	-1.29	1
JPM Income A (acc) USD	23'875'039	-5.95	2	M&G (Lux) Em Mkts Bd A USD Acc	42'962'858	-1.31	2
Franklin Strategic Income A(acc)USD	3'103'505	-6.64	3	T. Rowe Price EM Corp Bd A USD	13'064'754	-3.28	3
AB American Income A2 USD	1'032'584	-8.65	4	BNY Mellon Em Mkts Corp Dbt USD A Acc	21'931'248	-4.09	4
Fidelity US Dollar Bond A-Acc-USD	2'728'991	-11.31	5	Ninety One GSF EM InvGrd CpDt A Acc USD	50'987'018	-4.27	5

Aktien Schweiz				Aktien Europa			
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Benchmark 1: SIX SMI TR CHF				Benchmark 1: EURO STOXX 50 NR EUR			
UBS (CH) Equity Fd Swiss Hi Div CHF P	12'722'638	13.75	1	M&G (Lux) Eurp Strat Val A EUR Acc	42'941'639	22.55	1
DWS Aktien Schweiz CHF LC	3'029'161	10.79	2	M&G (Lux) PanEurpSustainParisAlgn€AAcc	42'906'220	16.17	2
UBS (CH) Equity Fund Swiss Income CHF P	1'704'395	8.64	3	BGF European Value A2	567'964	14.74	3
Pictet CH - Swiss Equities P dy CHF	278'392	7.55	4	JPM Europe Strategic Growth A (acc) EUR	2'051'111	10.20	4
UBAM Swiss Equity AC CHF	263'686	-1.63	5	BGF European Special Situations A2	1'500'665	4.44	5

Aktien USA				Aktien Emerging Markets			
	Valor	Rendite (%) in CHF 01.04.2021 31.03.2024	Rang		Valor	Rendite (%) in CHF 01.04.2021 31.03.2024	Rang
Benchmark 1: S&P 500 TR USD				Benchmark 1: MSCI EM NR USD			
BNPP Sust US Value Mit-Fac Eq Cl R	37'844'610	34.07	1	JPM Emerging Markets Div A (acc) USD	20'155'950	-8.05	1
DWS Invest CROCI US USD LC	40'586'859	25.16	2	BGF Emerging Markets Eq Inc A2	13'426'415	-15.89	2
BGF US Flexible Equity A2	1'501'042	22.66	3	Amundi Fds Em Mkts Eq Foc A USD C	3'371'361	-21.96	3
T. Rowe Price US Lg Cap Gr Eq A USD	1'579'124	19.25	4	MS INV F Emerging Leaders Equity A	19'280'492	-25.15	4
GS US Equity ESG Base Acc USD	2'345'222	17.98	5	BGF Emerging Markets A2	156'338	-31.08	5

Aktien Japan				Rohstoffe			
	Valor	Rendite (%) in CHF 01.04.2021 31.03.2024	Rang		Valor	Rendite (%) in CHF 01.04.2021 31.03.2024	Rang
Benchmark 1: TOPIX TR JPY				Benchmark 1: S&P GSCI TR USD			
Man GLG Jpn CoreAlpha Eq D JPY	10'982'487	30.69	1	Schroder ISF Global Energy A Acc EUR	4'381'402	78.69	1
M&G (Lux) Japan A EUR Acc	42'941'116	20.34	2	Ninety One GSF Gbl Ntrl Res A Acc USD	3'836'602	46.05	2
Eastspring Inv Japan Dynamic A	12'628'809	15.46	3	BGF World Mining A2	620'823	-0.58	3
Pictet-Japanese Equity Sel P JPY	1'681'507	3.22	4	BGF Sustainable Energy A2	1'779'802	-4.71	4
GS Japan Equity Ptnrs Base Acc JPY	27'832'912	-4.24	5	RobecoSAM Smart Materials Eqs D EUR	55'752'198	-11.86	5

Aktien Nebenwerte Europa			
	Valor	Rendite (%) in CHF 01.04.2021 31.03.2024	Rang
Benchmark 1: MSCI Europe Small Cap PR EUR			
Nordea 1 - European S&M Cp St Eq BP EUR	4'991'026	-11.85	1
DWS Invest ESG Eurp Small/Mid Cap LC	43'448'580	-15.20	2
DWS European Opportunities LD	344'963	-15.66	3
CT (Lux) Pan Eurp SmCp Opps AE	2'903'303	-25.50	4
Comgest Growth Eurp SmIrl Coms EUR Acc	1'082'007	-29.80	5

Quelle: Morningstar Direct