

Future Focus

The «Future» investment focus combines globally oriented investments with innovative and forward-looking investments. This takes technological developments and global megatrends into account in order to create stable and growth-orientated portfolios in the long term.

Within the investment focus, 80% of the portfolio is invested in globally oriented investments, 15% in three megatrends and 5% in five selected cryptocurrencies.

Performance of model portfolio capital gain: Future Focus



Key figures

	Sharpe Ratio ¹ since launch 1.1.2025 (ann)	Volatility since launch 1.1.2025 (ann)	Return since launch 1.1.2025	Return YtD	Total costs ² e-asset management
Capital gain	0.08	12.42%	9.07%	0.02%	0.93%

¹ A risk-free interest rate of 0.23% was used to calculate the Sharp ratio

² Includes the TER of the funds as well as the service fee (0.75%)

These figures relate to past performance. Past performance is not a reliable indicator of future results.

The performance shown does not take account of any commissions and costs charged when purchasing units or of the service fee.

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