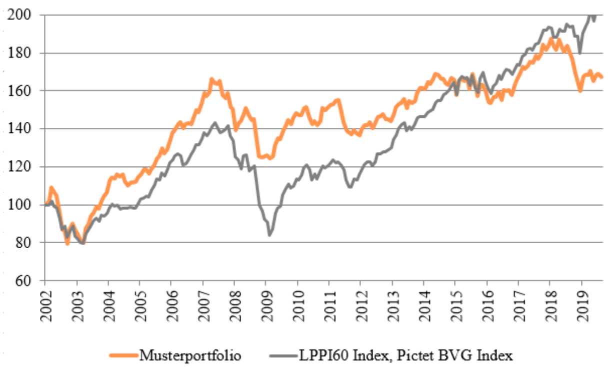
Performance Musterportfolio in CHF



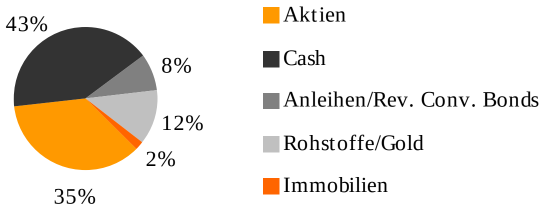
Anlagepolitik

Die von der Actieninvest verfolgte Anlagestrategie beruht auf folgenden Richtlinien:

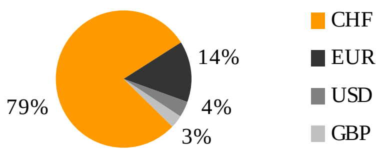
- Risikodiversifikation (15-20 Titel)
- Langfristiger Anlagehorizont (3-5 Jahre)
- Fundamentale Aktienanalyse
- Hauptfokus auf Aktien aus der Schweiz und Deutschland
- Absoluter Wertzuwachs
- Kein Leverage
- Overlay zur Steuerung des Investmentexposures
- Minimierung der Wertverluste in Baisse-Phasen

Portfolioallokation

Anlageklasse



Währungen



Statistiken (seit Januar 2002)

	Portfolio (CHF)	LPPI 60 (CHF)	SMI (CHF)	DAX (EUR)	EUR
Rendite August 2019	-1.17%	-0.09%	-0.24%	-2.05%	-1.12%
Kumulierte Rendite 2019	4.44%	13.32%	17.37%	13.08%	-3.54%
Jährliche Rendite	3.1%	4.1%	2.6%	5.4%	-1.6%
Volatilität	9.5%	9.3%	13.2%	20.0%	6.6%
Sharpe Ratio	0.24	0.36	0.14	0.23	
Sortino Ratio	0.50	0.64	0.30	0.40	
Maximaler Wertverlust	-27.1%	-41.3%	-50.4%	-55.1%	-38.4%

Grösste Positionen

Vifor Pharma..5.3 %
Nestlé ....5.3 %
SIG Combibloc ....4.9 %
AI Metal Certificate ....4.3 %
12% Bayer BRC...4.2 %

Historische Performance Musterportfolio in CHF (letzte 6 Jahre)

	Jan	Feb	Mär	Apr	Mai	Jun	Jul	Aug	Sep	Okt	Nov	Dez	Jahr
2013	2.6%	2.5%	1.3%	0.1%	1.5%	-3.2%	2.4%	-0.5%	0.7%	2.8%	1.5%	0.2%	**12.4%**
2014	-0.5%	2.2%	-0.4%	1.6%	1.4%	-0.2%	-1.3%	-0.1%	-1.6%	-0.3%	2.5%	-0.7%	**2.5%**
2015	-4.9%	5.0%	0.5%	-0.6%	0.4%	-2.9%	4.6%	-3.2%	-3.7%	3.7%	0.0%	-1.9%	**-3.5%**
2016	-3.6%	-0.5%	2.3%	-0.1%	1.6%	-2.8%	3.7%	-0.3%	0.1%	-1.6%	3.5%	1.5%	**3.6%**
2017	1.9%	2.2%	-0.4%	0.7%	1.2%	-0.4%	2.3%	-1.1%	1.5%	2.7%	-1.5%	1.4%	**11.0%**
2018	1.8%	-2.3%	-0.7%	2.9%	-2.3%	-1.2%	1.8%	-2.4%	-1.3%	-4.2%	-2.3%	-3.5%	**-13.1%**
2019	4.6%	0.6%	0.0%	1.4%	-3.2%	1.9%	0.5%	-1.2%					**4.4%**

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