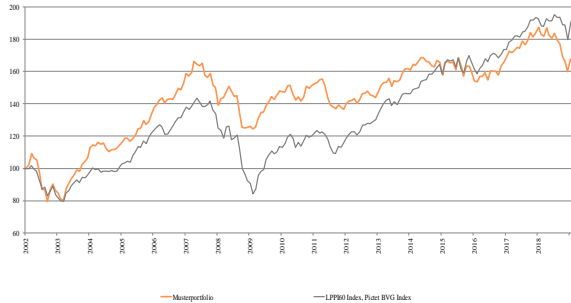


Performance Musterportfolio in CHF



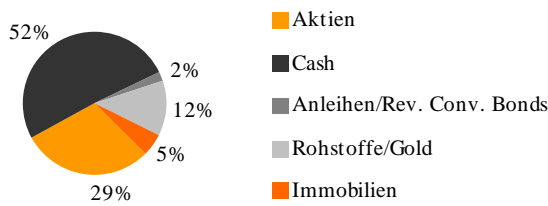
Anlagepolitik

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

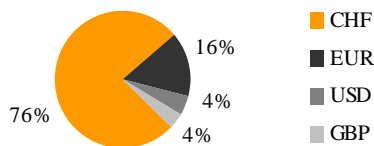
Anlageklasse



Statistiken (seit Januar 2002)

	Portfolio (CHF)	LPP60 (CHF)	SMI (CHF)	DAX (EUR)	EUR
Rendite Februar 2019	0.58%	1.92%	4.68%	3.07%	-0.28%
Kumulierte Rendite 2019	5.22%	7.92%	11.39%	9.07%	0.84%
Jährliche Rendite	3.1%	3.9%	2.1%	5.0%	-1.5%
Volatilität	9.5%	9.3%	13.3%	20.1%	6.6%
Sharpe Ratio	0.24	0.34	0.10	0.21	
Sortino Ratio	0.50	0.61	0.24	0.37	
Maximaler Wertverlust	-27.1%	-41.3%	-50.4%	-55.1%	-38.4%

Währungen



Grösste Positionen

Grand City Property	4.6 %
11.6% Vontobel auf Lufthansa	4.4 %
Glencore	4.3 %
Nestlé	4.3 %
10.25% Lonza BRC	4.3 %

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%											5.2%