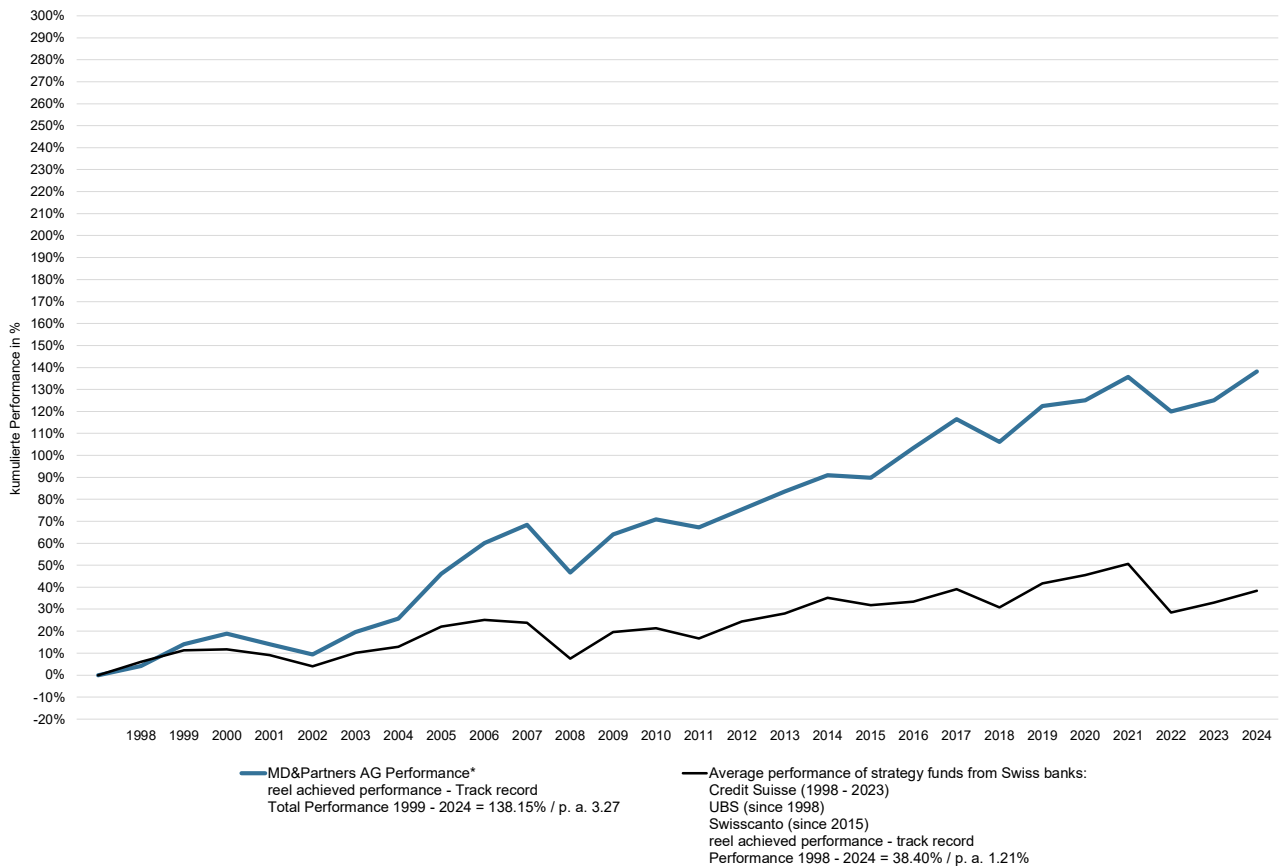




## Performance comparison strategy: "Income"



\* until 2022: Wertli Vermögensverwaltungs AG

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### performance data:

Wealth Management	Valor	Strategy	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Net Return MD&Partners AG*		Income	4.07%	9.62%	4.18%	-4.05%	-4.00%	9.23%	5.14%	16.18%	9.59%	5.15%	-12.86%
CS (Lux) Portfolio Fund Yield CHF (B)	672339	Income	7.97%	7.16%	-1.13%	-3.41%	-4.94%	6.31%	2.13%	9.79%	3.01%	-1.12%	-15.22%
UBS (Lux) Strategy Fund - Yield (CHF) P-acc	601322	Income	4.08%	2.68%	2.07%	-1.43%	-4.43%	5.76%	2.70%	6.47%	1.92%	-0.94%	-11.13%
Swisscanto (CH) Portfolio Fund Responsible Relax AA CHF	237924	Income											

Wealth Management	Valor	Strategy	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Net Return MD&Partners AG*		Income	11.79%	4.24%	-2.17%	4.86%	4.70%	4.02%	-0.59%	7.09%	6.49%	-4.79%	7.93%
CS (Lux) Portfolio Fund Yield CHF (B)	672339	Income	11.72%	1.30%	-5.68%	7.01%	1.45%	5.35%	-2.39%	1.13%	4.71%	-6.51%	8.80%
UBS (Lux) Strategy Fund - Yield (CHF) P-acc	601322	Income	10.80%	1.70%	-2.13%	6.33%	4.37%	5.74%	-2.37%	1.80%	6.22%	-7.33%	8.75%
Swisscanto (CH) Portfolio Fund Responsible Relax AA CHF	237924	Income							-2.53%	0.90%	1.53%	-3.91%	7.47%

Wealth Management	Valor	Strategy	2020	2021	2022	2023	2024	Gesamtrendite	Ø pro Jahr
Net Return MD&Partners AG*		Income	1.16%	4.73%	-6.69%	2.33%	5.82%	138.15%	3.27%
CS (Lux) Portfolio Fund Yield CHF (B)	672339	Income	1.37%	4.98%	-14.38%	2.90%		30.11%	0.98%
UBS (Lux) Strategy Fund - Yield (CHF) P-acc	601322	Income	1.79%	4.48%	-16.01%	3.37%	1.98%	38.23%	1.21%
Swisscanto (CH) Portfolio Fund Responsible Relax AA CHF	237924	Income	4.90%	1.11%	-13.74%	4.17%	6.14%	4.31%	0.42%