

MD&Partners

Long-term performance

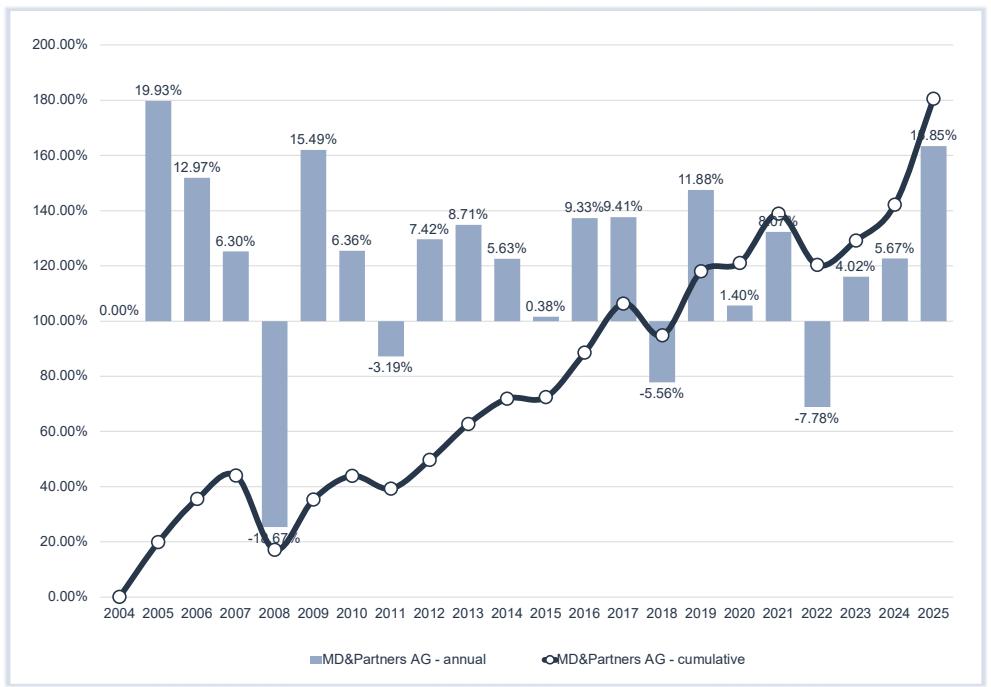
Investment strategy: Balanced

Monitoring time frame: 2005 bis 2025

Currency: CHF

Annual & cumulative net performances

	MD&P	Credit Suisse	UBS	Post Finance	Swiss-canto
Total	180.51%	39.18%	51.15%	80.08%	50.46%
Ø p.a.	5.03%	1.67%	1.99%	2.84%	1.96%
Year	MD&P	Credit Suisse	UBS	Post Finance	Swiss-canto
2005	19.93%	16.62%	11.60%	14.22%	12.91%
2006	12.97%	6.27%	5.35%	5.97%	3.46%
2007	6.30%	-0.72%	-1.78%	-1.81%	1.04%
2008	-18.67%	-25.21%	-21.44%	-22.51%	-25.01%
2009	15.49%	16.73%	14.98%	12.69%	17.89%
2010	6.36%	1.11%	1.60%	3.00%	0.01%
2011	-3.19%	-6.68%	-4.50%	-2.67%	-4.62%
2012	7.42%	9.36%	8.64%	8.13%	5.88%
2013	8.71%	5.42%	8.66%	10.95%	3.95%
2014	5.63%	7.94%	6.61%	9.84%	7.42%
2015	0.38%	-2.88%	-2.21%	-0.58%	-2.20%
2016	9.33%	1.16%	2.12%	1.62%	1.80%
2017	9.41%	8.27%	9.15%	8.72%	8.25%
2018	-5.56%	-8.68%	-8.87%	-6.97%	-7.77%
2019	11.88%	12.64%	12.28%	12.24%	10.86%
2020	1.40%	2.52%	1.69%	2.40%	3.74%
2021	8.07%	8.42%	7.75%	9.13%	7.12%
2022	-7.78%	-16.12%	-16.87%	-14.73%	-15.05%
2023	4.02%	3.63%	4.39%	4.42%	4.62%
2024	5.67%	4.38%	3.74%	6.96%	10.84%
2025	15.85%	7.87%	7.62%	6.00%	



Performance comparison

Legend:

MD Partners:

- Net performance achieved after all fees
- Until 2022: Wertli Vermögensverwaltungs AG

Compared to Swiss banks' strategic funds:

- UBS (Lux) Strategy Fund - Balanced (CHF) P-acc
- Credit Suisse (Lux) Portfolio Fund Balanced CHF (B)
- Swisscanto (CH) Portfolio Fund Responsible Balance AA CHF
- PostFinance (CH) ESG Balanced Strategy Fund (CHF)

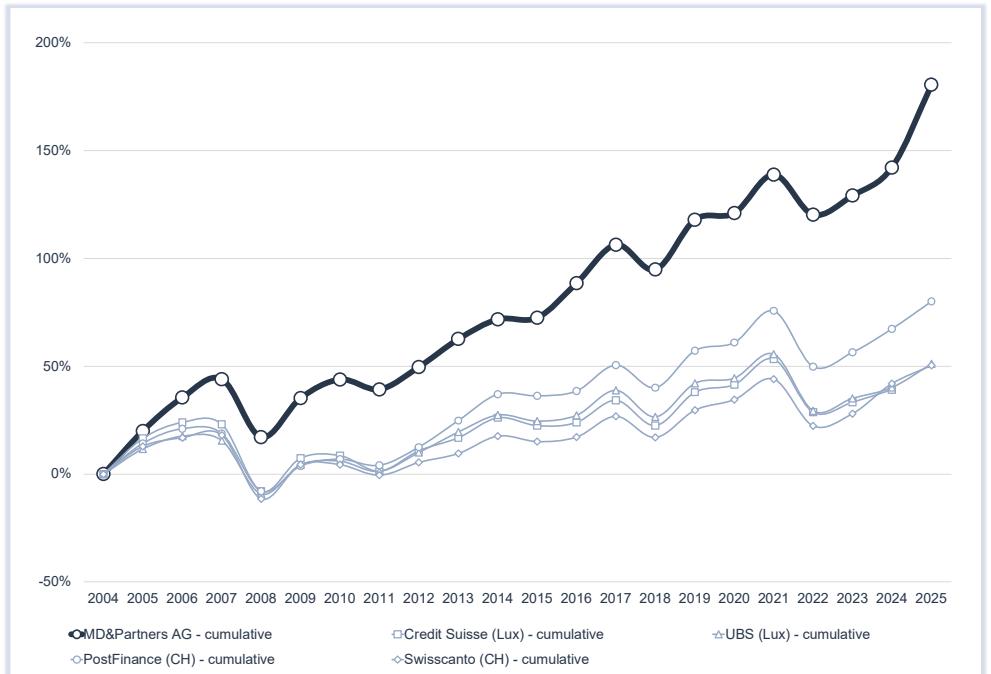
Data for the current year (2026):

The performance of your portfolio, as well as that of the benchmark funds, is measured on a year-to-date (YTD) basis.

Disclaimer:

This report is for informational purposes only and does not provide investment advice or recommendations. Past performance is not indicative for future results.

Morningstar (<https://global.morningstar.com/en-eu>) was used as the source for performance and benchmark data. No liability is assumed for accuracy, completeness or timeliness of information provided.



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