

MD&Partners

Long-term performance

Investment strategy: Growth

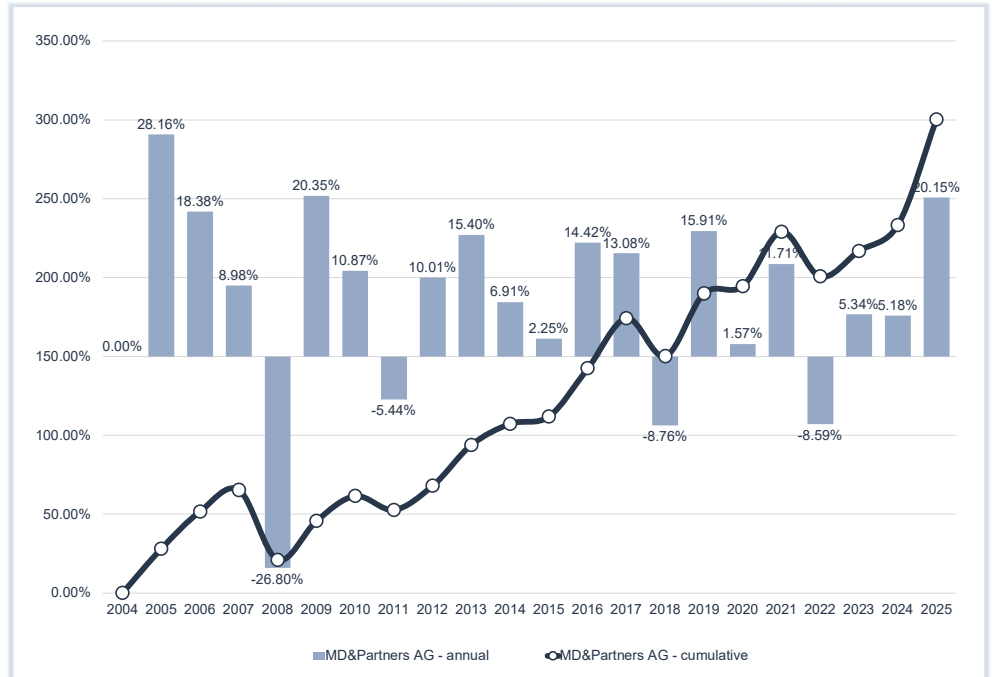
Monitoring time frame: 2005 bis 2025

Currency: CHF

Annual & cumulative net performances

	MD&P	Credit Suisse	UBS	Post Finance	Swisscanto
Total	300.38%	66.80%	73.34%	122.15%	67.25%
Ø p.a.	6.83%	2.59%	2.65%	3.87%	2.48%

Year	MD&P	Credit Suisse	UBS	Post Finance	Swisscanto
2005	28.16%	23.93%	17.01%	20.85%	19.07%
2006	18.38%	9.91%	9.14%	9.38%	5.87%
2007	8.98%	-0.76%	-2.61%	-2.64%	2.43%
2008	-26.80%	-33.96%	-30.55%	-32.94%	-37.08%
2009	20.35%	20.97%	18.85%	16.81%	25.62%
2010	10.87%	0.31%	1.68%	2.83%	0.25%
2011	-5.44%	-8.30%	-6.72%	-5.47%	-7.18%
2012	10.01%	11.78%	10.26%	10.51%	8.36%
2013	15.40%	9.61%	13.10%	17.86%	6.39%
2014	6.91%	10.42%	6.98%	11.69%	8.63%
2015	2.25%	-3.36%	-2.45%	-0.91%	-2.88%
2016	14.42%	1.54%	2.26%	2.17%	2.26%
2017	13.08%	12.52%	12.46%	13.34%	12.46%
2018	-8.76%	-10.96%	-10.54%	-9.35%	-10.98%
2019	15.91%	16.96%	15.79%	17.84%	14.84%
2020	1.57%	3.31%	1.76%	2.81%	3.19%
2021	11.71%	12.70%	11.84%	16.01%	10.75%
2022	-8.59%	-18.16%	-17.93%	-15.51%	-15.88%
2023	5.34%	4.35%	5.49%	4.90%	4.77%
2024	5.18%	8.56%	5.76%	9.19%	13.66%
2025	20.15%		10.19%	10.15%	7.59%



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 - Growth (CHF) P-acc
- Credit Suisse (Lux) Portfolio Fund Growth CHF (B)
- Swisscanto (CH) Portfolio Fund Responsible Ambition AA CHF
- PostFinance (CH) ESG Growth Strategy Fund (CHF)

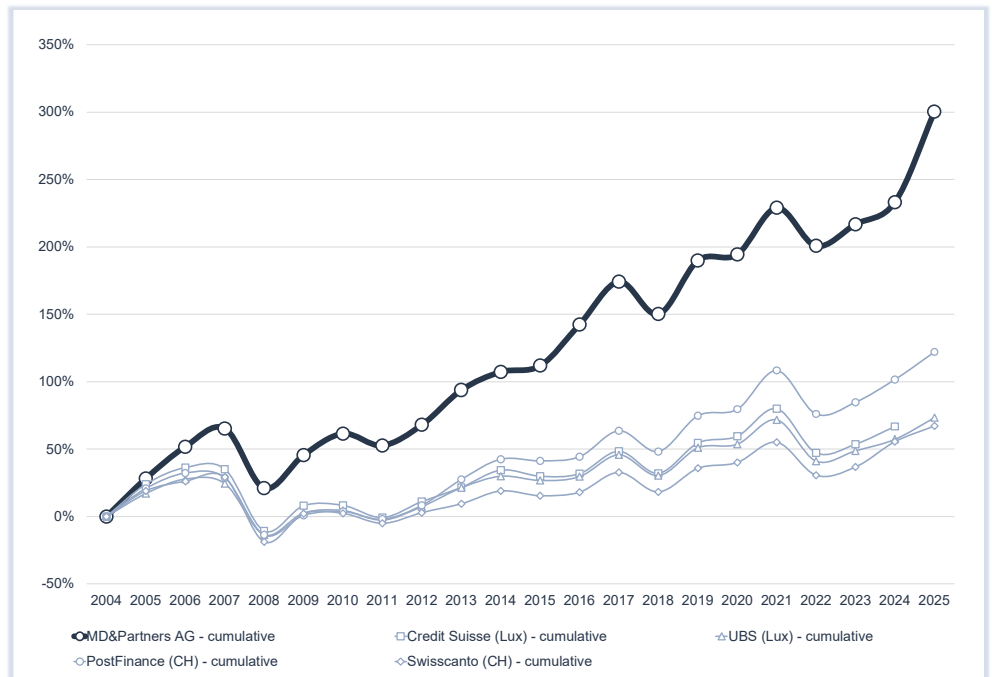
Data for the current year (2026):

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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