

MD&Partners

Long-term performance

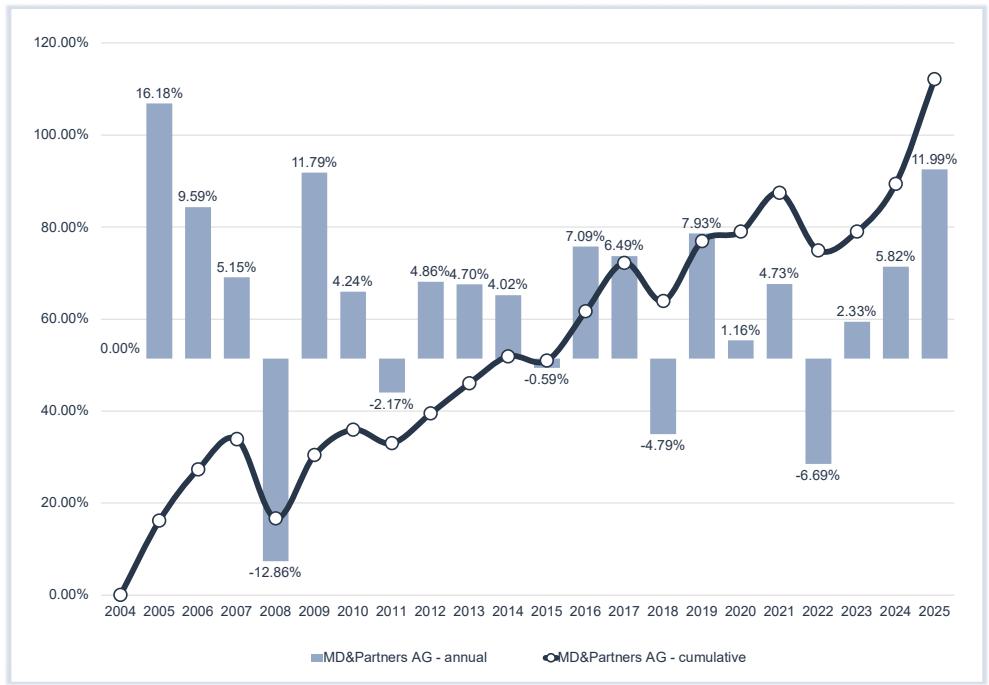
Investment strategy: Income

Monitoring time frame: 2005 bis 2025

Currency: CHF

Annual & cumulative net performances

	MD&P	Credit Suisse	UBS	Post Finance	Swiss-canto
Total	112.12%	16.03%	31.14%	47.73%	34.10%
Ø p.a.	3.65%	0.75%	1.30%	1.88%	1.41%
Year	MD&P	Credit Suisse	UBS	Post Finance	Swiss-canto
2005	16.18%	9.79%	6.47%	10.09%	7.05%
2006	9.59%	3.01%	1.92%	3.36%	1.32%
2007	5.15%	-1.12%	-0.94%	-0.84%	1.27%
2008	-12.86%	-15.22%	-11.13%	-13.48%	-12.73%
2009	11.79%	11.72%	10.80%	8.77%	11.02%
2010	4.24%	1.30%	1.70%	2.26%	-0.74%
2011	-2.17%	-5.68%	-2.13%	-0.07%	-1.04%
2012	4.86%	7.01%	6.33%	5.54%	4.36%
2013	4.70%	1.45%	4.37%	5.10%	1.16%
2014	4.02%	5.35%	5.74%	7.73%	5.17%
2015	-0.59%	-2.39%	-2.37%	-0.06%	-1.13%
2016	7.09%	1.13%	1.80%	0.76%	1.09%
2017	6.49%	4.71%	6.22%	5.14%	4.81%
2018	-4.79%	-6.51%	-7.33%	-4.93%	-5.15%
2019	7.93%	8.80%	8.75%	8.15%	7.88%
2020	1.16%	1.37%	1.79%	1.90%	4.17%
2021	4.73%	4.98%	4.48%	4.09%	3.15%
2022	-6.69%	-14.38%	-16.01%	-14.17%	-14.36%
2023	2.33%	2.90%	3.37%	4.14%	3.88%
2024	5.82%	1.70%	1.98%	5.30%	8.29%
2025	11.99%	5.88%	4.84%	4.13%	



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 - Yield (CHF) P-acc
- Credit Suisse (Lux) Portfolio Fund Yield CHF (B)
- Swisscanto (CH) Portfolio Fund Responsible Select AA CHF
- PostFinance (CH) ESG Income Strategy Fund (CHF)

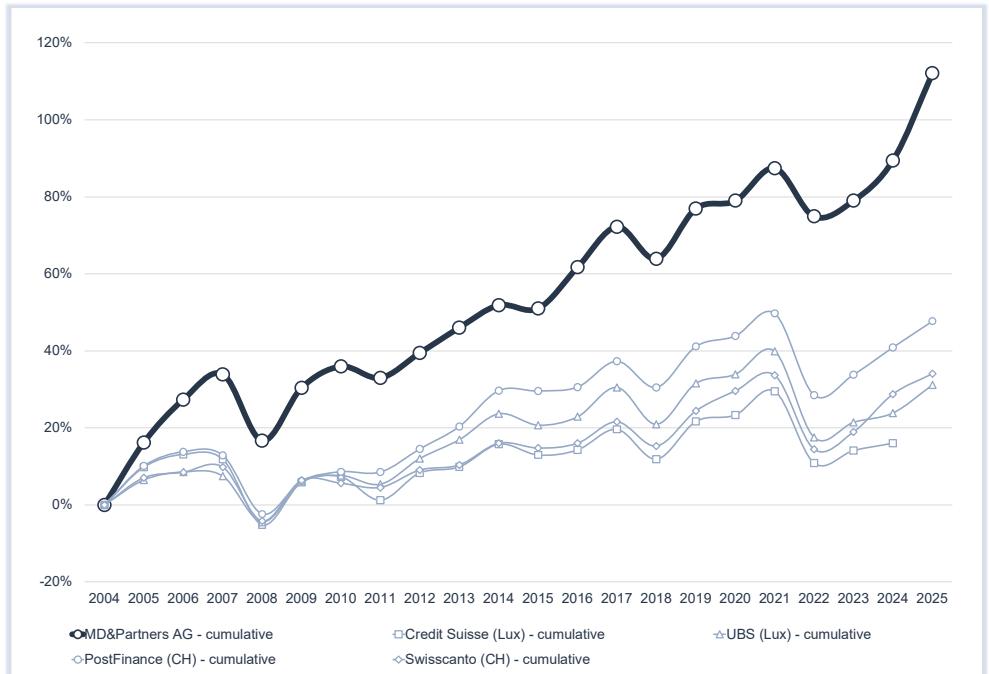
Data for the current year (2026):

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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