

Portfolios performance review and comparison

	Launch date	Since inception	2023	2024	2025	YTD
Managed						
Conservative	30.12.2022	7.30%	3.13%	2.18%	1.82%	0.00%
Moderate	30.12.2022	12.99%	4.12%	3.39%	4.96%	0.00%
Balanced	30.12.2022	21.07%	6.20%	5.68%	7.87%	0.00%
Dynamic	30.12.2022	28.86%	7.81%	7.28%	11.42%	0.00%
Very dynamic	30.12.2022	38.04%	9.86%	10.14%	14.08%	0.00%

Essentials Swiss						
Conservative	02.12.2024	1.04%	-	-	2.11%	0.00%
Moderate	10.10.2024	4.39%	-	-	5.47%	0.00%
Balanced	10.10.2024	7.03%	-	-	8.42%	0.00%
Dynamic	16.10.2024	8.10%	-	-	10.99%	0.00%
Very dynamic	07.05.2025	12.15%	-	-	-	0.00%

Essentials Global						
Conservative	24.10.2024	1.16%	-	-	2.38%	0.00%
Moderate	10.10.2024	4.34%	-	-	5.27%	0.00%
Balanced	10.10.2024	7.85%	-	-	8.47%	0.00%
Dynamic	10.10.2024	10.75%	-	-	10.90%	0.00%
Very dynamic	10.10.2024	14.55%	-	-	14.54%	0.00%

Essentials Sustainable						
Conservative	21.11.2024	-0.03%	-	-	0.56%	0.00%
Moderate	10.10.2024	1.51%	-	-	2.53%	0.00%
Balanced	10.10.2024	4.84%	-	-	5.33%	0.00%
Dynamic	16.10.2024	5.08%	-	-	6.56%	0.00%
Very dynamic	11.03.2025	13.26%	-	-	-	0.00%

Essentials Global + Crypto						
Balanced	24.02.2025	7.09%	-	-	-	0.00%
Dynamic	24.02.2025	6.90%	-	-	-	0.00%
Very dynamic	10.10.2024	16.29%	-	-	11.48%	0.00%

Performance watcher						
Conservative	30.12.2022	10.99%	2.70%	4.32%	3.59%	0.00%
Moderate	30.12.2022	14.01%	2.99%	5.37%	5.06%	0.00%
Balanced	30.12.2022	17.07%	3.27%	6.41%	6.54%	0.00%
Dynamic	30.12.2022	20.57%	3.56%	8.02%	77.9%	0.00%
Very dynamic	30.12.2022	29.81%	7.46%	11.00%	8.83%	0.00%

Source: Alpian, Bloomberg. Data from 30/12/2022 - 31/12/2025. This document is provided for informational and illustrative purposes only, and does not constitute an offer, solicitation, or recommendation to sell any financial instrument, nor does it constitute investment advice within the meaning of the Swiss Financial Services Act (FinSA). Performance data shown reflect composite portfolio allocations that are based on the average weights of each asset class, in the strategic asset allocation of each risk profile. Please note that each "Managed by Alpian" investment strategy is customized, so the weights you receive from our investor onboarding questionnaire may differ from those shown here. Any performance figures displayed account for the aggregate performance, net of fees, of all clients at Alpian. Individual investment returns may differ due to a variety of factors, including, but not limited to, the date of investment and the investment strategy employed. Past performance is not a guarantee of future return. [Performance Watcher Indices](#) | [Performance Watcher](#) are computed daily from their community's discretionary portfolios based on internal data, carefully classified by currency and mandate risk level. Performance Watcher is an independent, third-party platform and indices shown are for illustrative purposes only: they are not official benchmarks or recognized financial behaviors and may not reflect your own investments. Alpian's "Managed by Alpian" clients are clustered by on the percentage of equity in their portfolio. Closed portfolio and clients who switched strategy are excluded. The performance is time weighted (TWR). Strategic asset allocations are tailor-made and depend on each client's individual risk tolerance, time horizon, investment objective, financial situation and knowledge and experience. It can also be adjusted adding impact preferences and restrictions in terms of asset classes. Further details on the methodology used to calculate performance figures and portfolio allocations are available upon request. Alpian SA accepts no liability for losses arising from the use of this document or its contents. For more information about Alpian's offering on discretionary portfolio management, please refer to the official Bank website at www.alpian.com.

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