

# Portfolios performance review and comparison

	Launch date	Since inception	2023	2024	2025	YTD
<b>Managed</b>						
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%
<b>Essentials Swiss</b>						
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%
<b>Essentials Global</b>						
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%
<b>Essentials Sustainable</b>						
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%
<b>Essentials Global + Crypto</b>						
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%
<b>Performance watcher</b>						
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%

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