

# Equity Portfolios

Equity portfolios are built for long-term capital preservation and increase. Customized offers are available on request. The list below provides you with the best-in-class selection for this portfolio category.



|                   | Manager Rating | Rating | Track Record (2010-2020) |             | Risk | Costs Rating |
|-------------------|----------------|--------|--------------------------|-------------|------|--------------|
|                   |                |        | Return                   | Return p.a. |      |              |
| Passive Benchmark |                |        | 194%                     | 10.3%       | 10.7 |              |
| Median            |                |        | 117%                     | 7.3%        | 11.6 |              |
| Asset Manager 367 | 3.2            | 3.7    | 349%                     | 14.6%       | 13.6 | 4.7          |
| Asset Manager 9   | 3.3            | 3.5    | 245%                     | 11.9%       | 13.4 | 4.4          |
| Asset Manager 369 | 3.4            | 3.0    | 178%                     | 9.7%        | 10.8 | 4.6          |
| Asset Manager 280 | 3.5            | 3.3    | 368%                     | 15.1%       | 14.3 | 4.5          |
| Asset Manager 391 | 3.2            | 3.7    | 216%                     | 11.0%       | 11.5 | 4.0          |
| Asset Manager 326 | 2.6            | 3.8    | 206%                     | 10.7%       | 12.2 | 4.6          |
| Asset Manager 2   | 2.8            | 3.3    | 181%                     | 9.8%        | 13.4 | 4.4          |
| Asset Manager 438 | 3.1            | 3.1    | 245%                     | 11.9%       | 12.8 | 4.4          |
| Asset Manager 411 | 3.0            | 3.5    | 266%                     | 12.5%       | 13.7 | 4.1          |
| Asset Manager 144 | 2.8            | 3.5    | 228%                     | 11.4%       | 12.1 | 4.0          |

**Legend**

<2.9: unsatisfactory / 3.0-3.3: satisfactory / >3.4 good to very good