

Vorlage control.

Portfoliokontrolle

Anlageziel des Portfolios

Implementierungskontrolle

Historische Renditen			
Jahr	Rendite Portfolio	Rendite Benchmark	Rating
2019	%	%	
2018	%	%	
2017	%	%	
2016	%	%	
2015	%	%	
Seit Start	%	%	

Anfallende Kosten		
Kostenart	Budget	Effektiv
Depot		
Transaktion		
Verwaltung		
Produkte		
Übrige		
Total		

Strategieüberprüfung

Aktuelle Anlageallokation		
Anlageklasse	Strategie	Heute
Cash	%	%
Obligationen	%	%
Aktien	%	%
Alternative	%	%

Konklusionen



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