

Schindler-Stiftung / Übersicht der Anlagestrategien ab 1.1.2020

Strategie	Anlagebausteine				
	Konto	Basis	Aktien	Immo	Total
1	100%	0%	0%	0%	100%
2	70%	0%	0%	30%	100%
3	70%	30%	0%	0%	100%
4	50%	50%	0%	0%	100%
5	25%	60%	0%	15%	100%
6	0%	100%	0%	0%	100%
7	0%	60%	15%	25%	100%
8	0%	60%	25%	15%	100%
9	0%	75%	25%	0%	100%
10	0%	25%	50%	25%	100%

strategische Anteile				
Nominalwerte	Aktien	Immobilien	Altern. Anlagen	Total
100.00%	0.00%	0.00%	0.00%	100.00%
70.00%	0.00%	30.00%	0.00%	100.00%
76.60%	9.30%	8.25%	5.85%	100.00%
61.00%	15.50%	13.75%	9.75%	100.00%
38.20%	18.60%	31.50%	11.70%	100.00%
22.00%	31.00%	27.50%	19.50%	100.00%
13.20%	33.60%	41.50%	11.70%	100.00%
13.20%	43.60%	31.50%	11.70%	100.00%
16.50%	48.25%	20.63%	14.63%	100.00%
5.50%	57.75%	31.88%	4.88%	100.00%

Anteil CHF ca.
100.00%
100.00%
91.00%
85.00%
82.00%
70.00%
71.50%
64.50%
60.00%
57.50%

Kosten TER ca.
0.00%
0.17%
0.24%
0.40%
0.56%
0.80%
0.64%
0.59%
0.63%
0.39%

rot = Immobilien über 30% und/oder Aktien über 50% und/oder Alternative Anlagen über 15%
 Anteil CHF = Investitionen in Schweizer Franken; die Differenz zu 100% ist hauptsächlich in EUR und USD investiert

TER = Total expense ratio

Performances der Anlagebausteine

Jahr	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Konto	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Basis	12.1%	8.4%	3.6%	-13.0%	12.4%	5.5%	-1.1%	7.9%	7.2%	8.7%	2.6%	4.9%	9.5%	-1.5%	12.3%	2.6%
Aktien	28.2%	17.2%	1.7%	-43.7%	23.8%	-10.0%	-8.3%	13.5%	22.5%	13.2%	0.4%	6.9%	19.5%	-8.8%	25.8%	6.3%
Immobilien	4.4%	4.6%	4.7%	4.4%	4.7%	4.3%	5.6%	7.0%	4.9%	5.0%	4.8%	4.7%	4.6%	4.7%	4.2%	7.1%

Kosten TER ca.
0.00%
0.80%
0.10%
0.56%

Historische Performance der neuen Anlagestrategien pro Jahr

Strategie	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
1	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2	1.3%	1.4%	1.4%	1.3%	1.4%	1.3%	1.7%	2.1%	1.5%	1.5%	1.4%	1.4%	1.4%	1.4%	1.3%	2.1%
3	3.6%	2.5%	1.1%	-3.9%	3.7%	1.7%	-3.9%	2.4%	2.2%	2.6%	0.8%	1.5%	2.9%	-0.4%	3.7%	0.8%
4	6.1%	4.2%	1.8%	-6.5%	6.2%	2.8%	-0.6%	4.0%	3.6%	4.4%	1.3%	2.5%	4.8%	-0.7%	6.1%	1.4%
5	7.9%	5.7%	2.9%	-7.1%	8.1%	3.9%	0.2%	5.8%	5.1%	6.0%	2.3%	3.6%	6.4%	-0.2%	8.0%	2.7%
6	12.1%	8.4%	3.6%	-13.0%	12.4%	5.5%	-1.1%	7.9%	7.2%	8.7%	2.6%	4.9%	9.5%	-1.5%	12.3%	2.6%
7	12.6%	8.8%	3.6%	-13.3%	12.2%	2.9%	-0.5%	8.5%	8.9%	8.5%	2.8%	5.2%	9.8%	-1.0%	12.3%	4.5%
8	15.0%	10.0%	3.3%	-18.1%	14.1%	1.4%	-1.9%	9.2%	10.7%	9.3%	2.4%	5.4%	11.3%	-2.4%	14.4%	4.4%
9	16.1%	10.6%	3.1%	-20.7%	15.3%	1.6%	-2.9%	9.3%	11.0%	9.8%	2.1%	5.4%	12.0%	-3.3%	15.6%	3.7%
10	18.2%	11.9%	2.9%	-24.0%	16.2%	-2.6%	-3.0%	10.5%	14.3%	10.0%	2.0%	5.9%	13.3%	-3.6%	17.0%	6.0%

Historische, kumulative Performance der neuen Anlagestrategien von 2005 - 2018

Strategie	01.01.2005	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
1	100%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
2	100%	101.3%	102.7%	104.2%	105.5%	107.0%	108.4%	110.2%	112.5%	114.2%	115.9%	117.6%	119.2%	120.9%	122.6%
3	100%	103.6%	106.2%	107.4%	103.2%	107.0%	108.8%	108.4%	111.0%	113.4%	116.4%	117.3%	119.0%	122.4%	121.9%
4	100%	106.1%	110.5%	112.5%	105.2%	111.7%	114.8%	114.1%	118.7%	122.9%	128.3%	129.9%	133.1%	139.5%	138.5%
5	100%	107.9%	114.1%	117.4%	109.0%	117.9%	122.5%	122.7%	129.8%	136.4%	144.6%	147.8%	153.2%	163.1%	162.8%
6	100%	112.1%	121.5%	125.9%	109.5%	123.1%	129.9%	128.4%	138.6%	148.6%	161.5%	165.7%	173.8%	190.4%	187.6%
7	100%	112.6%	122.5%	126.9%	110.0%	123.5%	127.0%	126.4%	137.1%	149.4%	162.0%	166.5%	175.1%	192.3%	190.3%
8	100%	115.0%	126.5%	130.7%	107.1%	122.1%	123.9%	121.6%	132.7%	146.9%	160.5%	164.3%	173.2%	192.7%	188.1%
9	100%	116.1%	128.4%	132.4%	105.1%	121.1%	123.1%	119.5%	130.6%	145.0%	159.2%	162.5%	171.3%	191.9%	185.6%
10	100%	118.2%	132.2%	136.1%	103.4%	120.2%	117.1%	113.6%	125.5%	143.4%	157.7%	161.0%	170.4%	193.0%	186.1%