

Maerki Baumann & Co AG

Offer Report

Growth Strategy Wealth Office Conference 2026

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Risk Profile Growth	Management Approach Active	Minimum Portfolio Size CHF 1'500'000	Currency CHF
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Management Style

Our actively managed growth strategy targets long-term capital growth, anchored by a distinctive 37% CHF allocation—significantly above conventional global portfolios. Performance is driven by high-conviction equity selection with a consistent quality bias.

An 8% allocation to commodities provides protection against inflation and geopolitical shocks, while indirect Swiss real estate adds stability through equity-like returns with lower volatility.

The result is a resilient, real-asset-focused portfolio designed to combine return potential with downside protection—fully aligned with our principles of independence, security, and transparency.

Portfolio Composition

The portfolio allocates 82.5% to single-line stocks, 10.5% to ETFs, 6% to exchange-traded Swiss real estate funds, and 1% to CHF cash. All instruments are traded daily to ensure maximum liquidity. True to our independence, we use no in-house products, ensuring total transparency.

Custody

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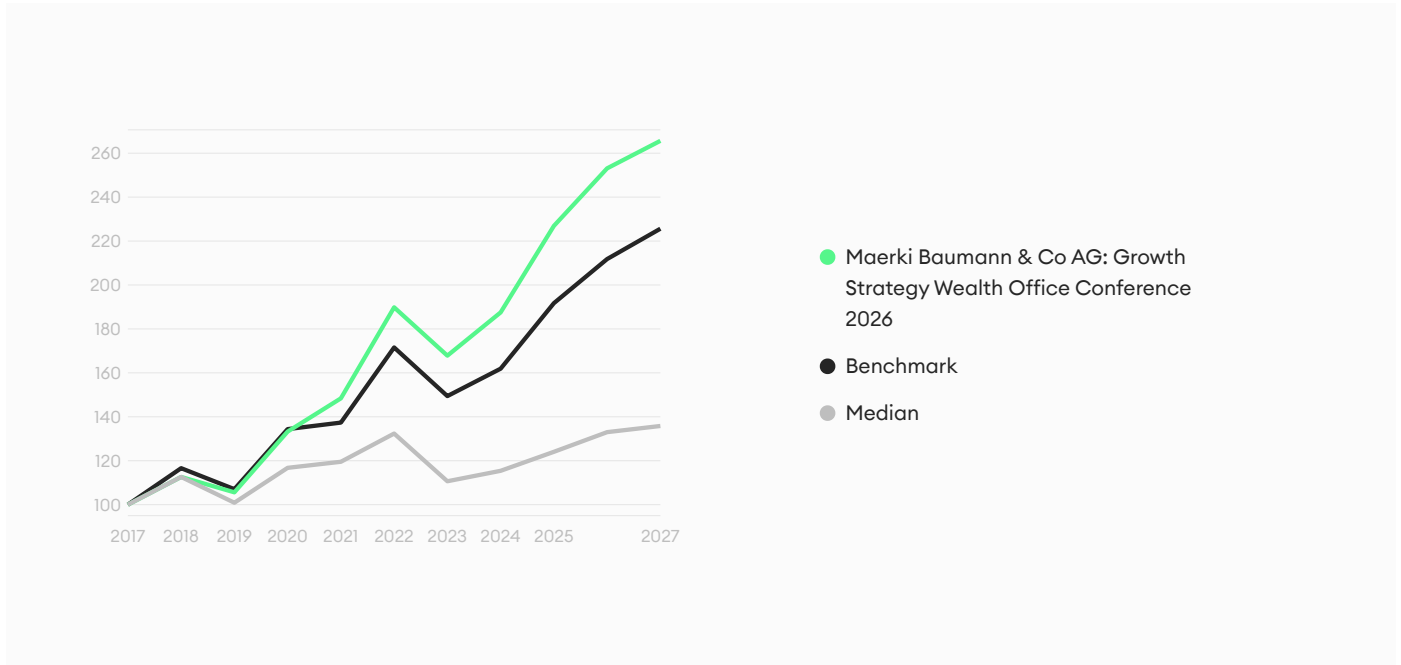
Asset Allocation

Allocation		Allocation		Allocation		Allocation	
Cash	1.0 %	Bonds	0.0 %	Equity	85.0 %	Alternatives	14.0 %
		High Grade	0.0 %	Global	45.0 %	Commodities	8.0 %
		High Yield	0.0 %	Europe	10.0 %	Gold	0.0 %
		Emerging Markets	0.0 %	Emerging Markets	0.0 %	Hedge Funds	0.0 %
		Convertibles	0.0 %	Pacific	0.0 %	Real Estate Global	0.0 %
				Switzerland	30.0 %	Real Estate Switzerland	6.0 %
				UK	0.0 %	Private Equity	0.0 %
				USA	0.0 %	Crypto	0.0 %

Track Record

Return: **165.6 %** Return p.a.: **11.0 %** Volatility: **12.8 %**

	2017	2018	2019	2020	2021	2022	2023	2024	2025	30.04.2026
Performance	12.61 %	-6.21 %	26.17 %	11.36 %	27.92 %	-11.59 %	11.73 %	21.00 %	11.55 %	4.95 %



Costs

The cost rating is based on an assumption of a 2 million mandate in the chosen currency and includes possible discounts offered on the ZWEI Wealth platform. The information is considered an indication and would be negotiated with the provider in the event of an offer.

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