

Dr. Pirmin Hotz VV

# Offer Report

Standing Offer - Equity CHF

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Risk Profile <b>Equity</b>	Management Approach <b>Active</b>	Minimum Portfolio Size <b>CHF 800'000</b>	Currency <b>CHF</b>
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## Management Style

Mit einem Portfolio der «Welt AG» greift HotzVV die Wertschöpfung des weltweiten Unternehmertums ab. Die Selektion globaler Branchenführer in etablierten Märkten mit erprobten Geschäftsmodellen und eine Auswahl an soliden Schweizer Nebenwerten verleihen Stabilität, gleichgewichtete Positionen vermeiden Klumpenrisiken. Das antizyklische Zukaufen bei Rückschlägen wird für den Portfolioaufbau und im laufenden Management eingesetzt. Durch Rebalancing erfolgen Gewinnmitnahmen in Richtung der Zielaktienquote in Haussen. Dieses sehr disziplinierte Vorgehen und die hohe Qualität bei der Aktienauswahl ist die perfekte Grundlage, für den langfristigen, soliden Vermögensaufbau.

## Portfolio Composition

Ausschliesslich kosteneffiziente und transparente Direktanlagen mit hoher Qualität, keine Produkte. Globale Aktienauswahl (Schweiz rund ein Drittel, keine Schwellenländer). Anzahl Aktien abhängig von der Portfoliogrösse (30 bis 60 Titel). Restriktionen möglich.

## Custody

UBS

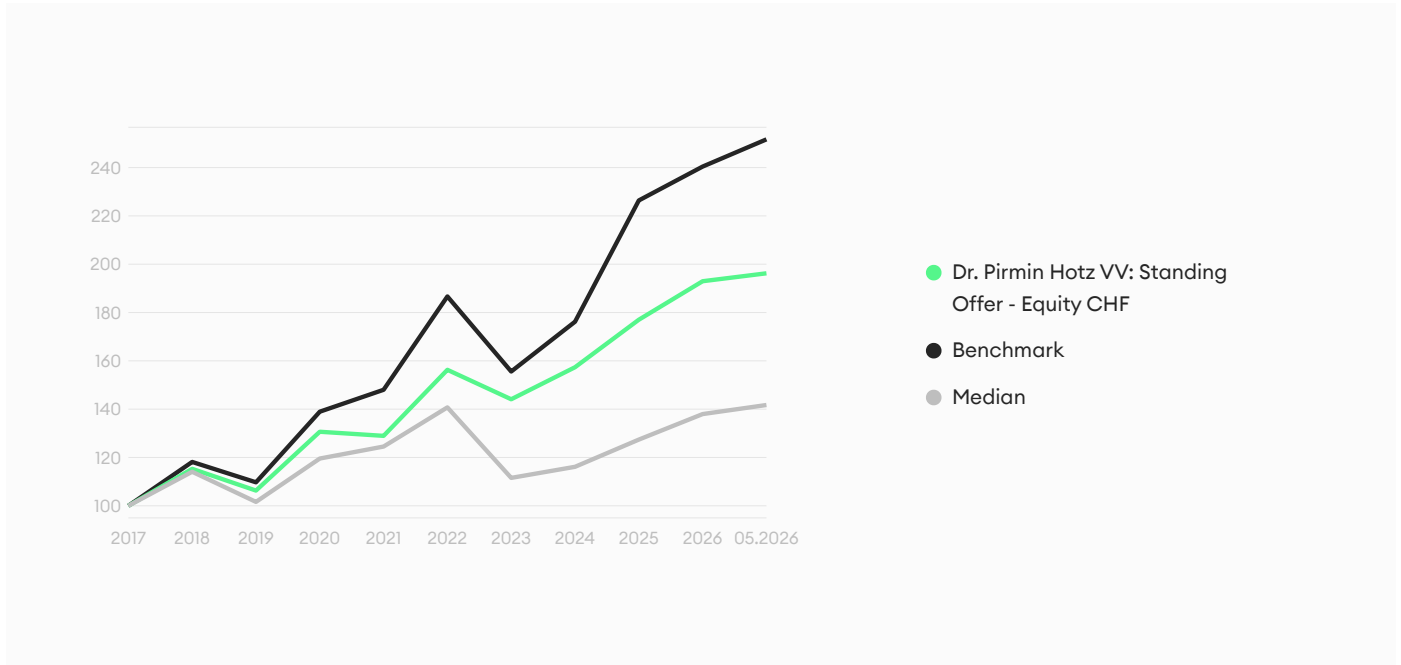
## Asset Allocation

Allocation		Allocation		Allocation		Allocation	
<b>Cash</b>	<b>0.0 %</b>	<b>Bonds</b>	<b>0.0 %</b>	<b>Equity</b>	<b>100.0 %</b>	<b>Alternatives</b>	<b>0.0 %</b>
		High Grade	0.0 %	Global	100.0 %	Commodities	0.0 %
		High Yield	0.0 %	Europe	0.0 %	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	0.0 %	Real Estate Switzerland	0.0 %
				UK	0.0 %	Private Equity	0.0 %
				USA	0.0 %	Crypto	0.0 %

# Track Record

Return: **96.2 %**    Return p.a.: **7.5 %**    Volatility: **11.0 %**

	2017	2018	2019	2020	2021	2022	2023	2024	2025	30.04.2026
<b>Performance</b>	15.30 %	-7.80 %	22.90 %	-1.30 %	21.20 %	-7.80 %	9.20 %	12.50 %	9.00 %	1.70 %



## 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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