



PRESS RELEASE

Basel, 24th February 2023

Once again, Tareno is Swiss Asset Manager of the Year



Award in a difficult capital market environment

Once again, Tareno AG has achieved a major success in the asset manager rating of BILANZ firstfive. In the overall ranking „Asset Manager of the Year 2023“, the Basel-based company took 1st place both over a 24-month period and a 36-month period. Being named Asset Manager of the Year is a confirmation of Tareno AG's sustainable and robust business model, particularly in a difficult capital market environment.

In order to succeed in this endurance test, the ratio of performance to the risks taken has to be as optimal as possible. The so-called Sharpe ratio is a key criteria of the rating, which BILANZ has been awarding since 2012. On behalf of the investor magazine, the German consulting institute firstfive examined as many as 125 client portfolios of 35 participants for the current rating.

This quality label cannot and should not hide that 2022 has been quite demanding for Tareno AG's clients. In an environment characterised with rising inflation, rising interest rates and extreme geopolitical tensions, all portfolios have been under pressure. Tareno's experienced team met this challenge with expertise and confidence.

Tareno earned the award with its dividend mandates. The focus on dividend and value stocks, defensive sectors and CHF investments paid off. Technology stocks and foreign currencies, on the other hand, played a rather minor role.

The first place in the BILANZ firstfive rating shows that investment solutions with a focus on dividends have once again passed the most recent stress test. Furthermore, the award is an incentive to deliver the very best for our customers on a daily basis and to defend our title as successfully as possible in the next year. From now on, the company has a new online presence. With a lot of effort and creativity, the website **tareno.ch** was completely revised last year. It is designed to present Tareno AG in all its facets in a digital, authentic and user-friendly style.

Asset Manager of the Year - the ground rules



TARENO

The evaluation process is based on real, anonymised client portfolios, which are submitted by the asset managers along with all transaction records. These are evaluated by firstfive, an independent controlling and ranking institute. The decisive factor is the performance in relation to the risk taken, known in technical jargon as the Sharpe ratio. This risk is measured by the fluctuations in the value of the client's securities account.

About Tareno AG

Tareno AG was founded in 2000 as a public limited company and is owned by three private partners. With around 40 employees and CHF 2.5 billion in client assets under management, we are one of the 15 largest independent asset managers in Switzerland. In addition to its headquarters in Basel, the company has a location in Zurich and a subsidiary in Luxembourg. Since 2007, we are the fund managers of the Tareno Global Water Solutions Fund.

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Picture Portfolio Management Team (from left to right): Frank Pfeiffer, Sybille Wyss, Katja Ackermann, Stefan Schütz