



TARENO
INTERNATIONAL
ASSET MANAGERS

PRESS RELEASE

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Performance Watcher Best Manager 2022

Tareno wins in two of three categories.

Performance Watcher, the evaluation and comparison platform for portfolio managers, recently announced the winners of the "Performance Watcher Best managers 2022" competition, which it held last year in collaboration with Sphere.

Tareno and Eagle Invest are the two winners of this very first edition. Tareno won the competition in two categories, Low Risk and Mid Risk, while Eagle Invest won in the High Risk category.

The competition aimed to measure and reward the managers with the best performance of discretionary portfolio management. The competition referred to the reference currency CHF with three different risk profiles: low, medium and high.

The classification was based on the actual annual return, taking volatility into account.

In the Low Risk category, Tareno achieved a performance of -8.5% with a risk budget of 6.5%. For comparison: The Performance Watcher Low Risk Index ended the year 2022 with -13.2% at a risk budget of 5.8%.

In the Mid Risk category, Tareno achieved a return of -11.4% with a risk budget of 9.9%. By comparison, the Performance Watcher Mid Risk Index ended 2022 at -15.2% with a risk budget of 8.8%.

Frank Pfeiffer, CIO Equities at Tareno AG explains *"In the Low Risk and Mid Risk profiles we used our dividend strategy. We managed the Low Risk with our strategy "Yield" and an equity quota of 25%. The Mid Risk was managed with our strategy "Balanced" and an equity quota of 50%. With regard to dividends, we select our positions using our own valuation model. It focuses not only on the absolute amount of the dividend payment, but also takes into account many other factors such as sustainability, profitability and momentum. It is the combination of these factors that makes this investment solution so successful.*

In fixed income, we wanted to take as little risk as possible while still achieving an attractive return. Therefore, we deliberately reduced credit and interest rate risk, which benefited us greatly in 2022, which was a catastrophic year for the entire fixed income class."

The results of the "Performance Watcher Best Manager 2022" competition can also be found on the Performance watcher website: www.performance-watcher.ch.



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Tareno AG

Tareno AG was founded in 2000 as a stock corporation and is owned by three private partners. With over 30 employees and around CHF 2.5 billion in client assets under management, we are one of the 15 largest independent asset managers in Switzerland. In 2023, we were again named Best Swiss Asset Manager of the Year by BILANZ. In addition to our headquarters in Basel, we have a location in Zurich and a subsidiary in Luxembourg. Since 2007 we are fund manager of the Tareno Global Water Solutions Fund.

Tareno AG holds a license as a manager of collective assets and is thus directly regulated by the Swiss Financial Market Supervisory Authority FINMA.

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