



TARENO
INTERNATIONAL
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Press release

Basel, 23th February 2024

Tareno once again Swiss Asset Manager of the Year



Award in a difficult capital market environment

Tareno AG has once again achieved a major success in the BILANZ Firstfive asset manager rating. In the overall Asset Manager of the Year 2024 ranking, the Basel-based financial services provider took first place over both the 36-month and 60-month periods. Once again being named Swiss Asset Manager of the Year reflects our consistent selection process, which favors high-quality companies with a sustainable business model.

In order to pass this acid test, the ratio of performance to risk taken must be as optimal as possible. The so-called Sharpe ratio is the central criterion for the rating that BILANZ has been awarding since 2012. On behalf of the investor magazine, the German consulting institute Firstfive scrutinized a total of 138 customer portfolios from 35 participating companies for the current rating.

Over the past 36 and 60 months, we have achieved a solid performance for our customers. The period under review was characterized by numerous challenges. The global pandemic, geopolitical tensions, the departure from the long-standing low interest rate policy and the return of inflation had a strong impact on investors' appetite for risk. As a result, the financial markets were subject to considerable fluctuations at times. Especially during such turbulent years, our investment principles contribute to sustainable investment success: strict risk control, a focus on quality, broad diversification, loyalty to the chosen investment strategy and adherence to a clear investment process.

Our targeted focus on high-quality bonds and high-dividend companies with robust business models and solid balance sheets contributed to our successful performance. In addition to large-capitalized companies, investments in small and medium-sized companies also made a significant contribution to performance. The targeted addition of growth stocks, particularly from the technology sector, also played a key role.

The success in the BILANZ Firstfive rating impressively underlines the fact that Tareno's investment solutions have withstood a wide range of stress tests, even over longer periods of time.



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Asset manager of the year - the rules

The evaluation process is based on real, anonymized client portfolios, which the asset managers submit together with all transaction receipts. These are analyzed by Firstfive, an independent controlling and ranking institute. The decisive factor is the performance in relation to the risk taken, known as the Sharpe ratio. This risk is measured by the fluctuations in value of the customer's securities account.

About Tareno

Founded in 2000 as a public limited company, Tareno is owned by three private partners. With around 40 employees and client assets under management of around CHF 2.8 billion, the company is one of the 15 largest independent asset managers in Switzerland. In addition to its headquarters in Basel, Tareno has a location in Zurich and a subsidiary in Luxembourg. Tareno, which has received several awards for its asset management services, also has many years of expertise in the water sector. It has managed the Tareno Global Water Solutions Fund since 2007, demonstrating its expertise in this specialized sector.

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Portfolio Management Team, from left: Stefan Schütz, Katja Von Krannichfeldt, Frank Pfeiffer