



TARENO
INDEPENDENT WEALTH &
ASSET MANAGER

Press release

Basel, February 28, 2025

Double award for Tareno: First place in the BILANZ rating and 25th anniversary



Tareno has once again been recognized in the renowned asset manager rating by BILANZ / Firstfive. In the overall ranking "Asset Manager of the Year 2025", we took first place in the supreme discipline over a period of 60 months. This is the sixth award in a row and confirms the added value that we create for our clients with our investment expertise. As if this were not reason enough to celebrate, we will be celebrating our 25th anniversary on March 6, 2025. For a quarter of a century, we have been working with passion and care to manage the assets entrusted to us individually, sustainably and in the best possible way.

We would like to say a double thank you - for the trust of our valued customers and the renewed recognition of our performance.

Best asset manager - for the sixth time in a row

In order to receive this prestigious award, the ratio between performance and risk taken must as high as possible. The so-called Sharpe Ratio is the central criterion for the rating, which BILANZ has been awarding since 2012. On behalf of the investor magazine, the German independent consulting institute Firstfive examined a total of 146 real, anonymized customer portfolios from 37 participating companies for the current rating

The first place over the past 60 months, i.e. 5 years, reflects the above-average asset growth that we have been able to achieve for our clients. This is not a matter of course. The period under review was characterized by far-reaching economic and geopolitical events that led to fundamental shifts on the financial markets. 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. Particularly during such turbulent phases, our investment philosophy makes a decisive contribution to sustainable investment success: strict risk control, focus on quality, broad diversification, loyalty to the chosen investment strategy and adherence to a clear investment process. The success in the BILANZ Firstfive rating underlines the fact that Tareno's investment solutions withstand a wide range of stress tests, even over long periods of time.

A decisive factor in our successful performance was our targeted focus on high-quality shares with a convincing and sustainable business model. We look for and find these characteristics not only in large-cap companies, but often also in less well-known second-tier stocks. The early recognition of growth markets, particularly in the technology sector, was also a decisive factor. Last but not least, the addition of selected alternative investments has made a significant contribution.



Simon Lutz has been responsible for the investment strategy and portfolio management of Tareno AG for just over a year. The business economist and CFA charterholder is continuing Tareno's successful investment strategy and developing it further on an ongoing basis. In doing so, he can draw on a competent portfolio management team and his many years of experience at various international and regional asset managers.

25 years of Tareno

Founded in 2000 as a public limited company, Tareno is owned by three private partners. With around 38 employees and client assets under management of CHF 3 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 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.



Portfolio Management Team



fl: Simon Lutz, Stefan Schütz, Katja Von Krannichfeldt, Frank Pfeiffer

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