



TARENO
INDEPENDENT WEALTH &
ASSET MANAGER

Media release

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Tareno once again named Wealth Manager of the Year

Tareno ranks **first over 60 months** in this year's wealth manager rating by BILANZ in collaboration with Firstfive. This is the seventh consecutive year that Tareno has received this award.

For the current rating, Firstfive analyzed a total of 151 real, anonymized client portfolios from 37 participating companies on behalf of BILANZ. The decisive factor for the rating is not the highest return, but the relationship between performance and risk taken. The Sharpe ratio has been the central evaluation criterion for this rating since 2012.



Agility and discipline in challenging market phases

The award-winning five-year period was marked by a pandemic, geopolitical tensions, inflation, and interest rate reversals. The financial markets were subject to considerable volatility at times.

The top ranking in this environment is a reflection of a clearly structured, focused, and successful investment philosophy:

"Sustainable investment success is based on adaptability, foresight, and disciplined implementation," says Simon Lutz, CIO of Tareno AG. "Last year, we specifically shifted our focus to neglected market segments such as commodity and healthcare stocks, as well as small and mid-cap companies, and added infrastructure investments to the mix. This strengthens the robustness of our strategies and creates additional return potential. In view of the rapid structural changes in geopolitics and technology, we expect the marked market shifts to continue. In this environment, we believe that our dynamic and forward-looking investment strategy puts us in a good position to continue our impressive track record."

More than performance: taking a holistic approach to responsibility

With assets under management of around CHF 3.3 billion, we bear special responsibility. This capital has been entrusted to us by our clients. Our aim is to live up to this trust every day, not only in terms of performance, but in all disciplines of professional asset management.

Personal relationships are important. Wealth management is a matter of trust. Our client advisors maintain close, long-term relationships with their clients. Transparent communication, clear explanations of market developments, and proactive information provide clarity and security. Service quality, availability, and reliability are not additional services, but an integral part of our identity.

All these elements form the basis for our clients' confidence that their assets are in good hands for the long term.



A sign of reliability

We do not see this renewed award as an end in itself. It is independent confirmation of our consistent approach to our work. For our clients, this means one thing above all: **professional asset management with calmness, consistency, and substance.**



Portfolio Management Tareno AG: Stefan Schütz (since 2007), Katja Von Krannichfeldt (since 2017), Simon Lutz (since 2024, center), Frank Pfeiffer (since 2015), Andreas Borer (since 2025)

Simon Lutz has been responsible for the investment strategy and portfolio management of Tareno AG for over two years. The business economist and CFA charterholder continues to pursue Tareno's successful investment strategy and develops it further on an ongoing basis. In doing so, he can draw on a competent and well-coordinated portfolio management team and his many years of experience with various international and regional asset managers.

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