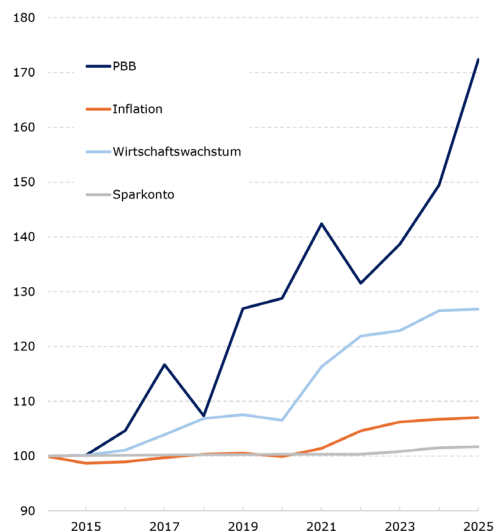


Bellerive Private Bank Performance Factsheet 2026

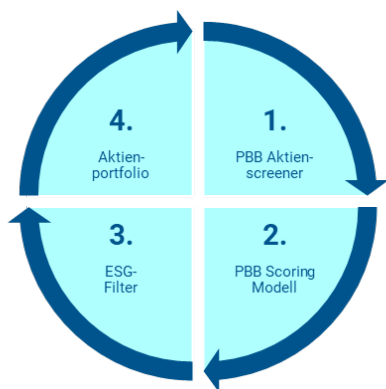
Description

- ✓ Higher long-term returns with reduced risk of loss
- ✓ Focus on preserving real wealth without loss of purchasing power
- ✓ Minimised risk of loss in years of severe market downturns through integrated risk management using systematic volatility sales
- ✓ Use of liquid instruments
- ✓ Proven, long-standing investment process with a track record of positive investment performance

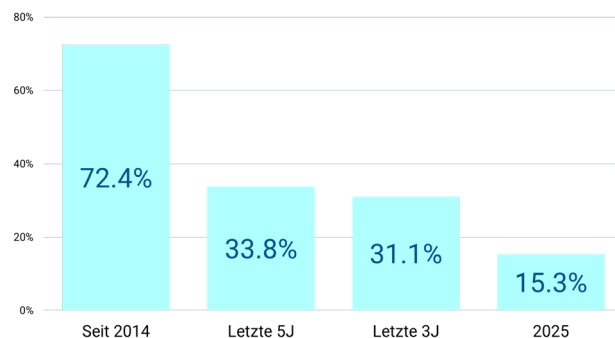
Long-term, real capital growth



Investment process



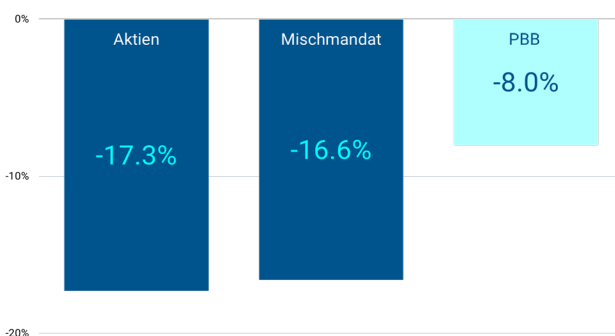
Percentage change in value



Key figures

Total costs:	0.60% per annum
Minimum investment	CHF 1 million
Asset manager:	Bellerive Private Bank
Custodian bank:	Bellerive Private Bank

The worst year in comparison



Bellerive Private Bank

Performance Factsheet 2026

A unique investment strategy

An asymmetric return profile is crucial for long-term investment success. In this context, 'asymmetric' means that reasonable returns are generated in good market years, whilst the risk of loss is minimised during poor market phases. Combined with the compound interest effect, this strategy delivers systematically superior performance compared to the traditional 'buy and hold' approach.

Contact persons



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Footnote

PBB:	Performance of the Bellerive Private Bank asset management mandate
Inflation:	Swiss National Consumer Price Index
Economic growth:	Switzerland's gross domestic product
Savings account:	Average interest rate on savings accounts held by Swiss private investors
Mixed portfolio:	Traditional pension fund portfolio comprising shares, bonds and foreign currencies
Shares:	MSCI World Total Return Index in local currency

Data source

Data from 2014 to 2025 in CHF, sources: Bellerive Private Bank, LSEG, SNB

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