

# Zugerberg Finanz portfolio analysis

## Analysis of your investment activity

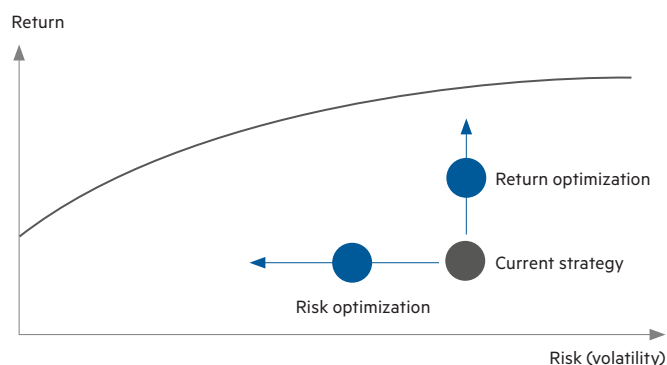
Private investors face diverse and complex challenges. The market environment is constantly changing and needs to be reassessed on an ongoing basis. With a portfolio analysis, we help you assess your current investment activity.

### Overview of the analysis

#### 1. Analysis of the investment strategy

A central component of asset management is the investment strategy. According to academic studies, the long-term allocation of funds to the various asset categories (such as equity, bonds, and real estate, etc.) is responsible for over 80% of the generated return.

#### Risk-return profile



We assess the long-term risk-return profile of your investment strategy based on state-of-the-art optimization applications and the latest scientific findings.

#### 2. Analysis of the cost structure

An optimal cost structure is an important element for a sustainable return. In particular, it is not easy to keep track of costs that are incurred within investment funds and structured products and are not directly offset. These include, among others:

<b>Investment decisions</b>	Asset management fees and product costs
<b>Transactions</b>	Courtages and stamp duties
<b>Custodianship</b>	Custody account and administration fees

The analysis systematically reviews all cost drivers and transparently shows where fees are incurred and what for.

### Advantages for you

- Professional second opinion from an independent asset management company
- Definition of areas to optimize and specific recommendations for action
- Free service

“The Zugerberg Finanz portfolio analysis is the ideal instrument to get a well-founded assessment of your current position. Making your portfolio fit can reduce risks and costs and optimize future returns.”

— Roman Leu (Head of Private Clients)

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