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PRESS RELEASE

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Fund managed by PKB ranked 3rd out of 124

Morningstar awards five stars for performance over three years, five years, ten years and overall

On 16 March 2022, the Alpha Flex investment fund, managed by PKB, was named by [Citywire](#) as the third best performer over 5 years in the universe of 124 funds rated "aggressive multi-asset" (Source: Morningstar). CFS Rating published a listing for Alpha Flex in its "Best300" 2022 directory, with a 5-star rating. Morningstar Italia lists Alpha Flex in the "Aggressive Balanced" category and gives it four five-star ratings for three-year, five-year, ten-year and overall performance.

The objective of Planetarium Alpha Flex is to optimise the risk/return profile of the classic 60/40 portfolio. The fund generally invests in companies with a long-term perspective. The selection process focuses on companies based in the world's most competitive economies with relatively low risk premiums, high governance standards and shareholder-friendly distribution policies. The sub-fund is designed as a diversification element of large portfolios comprising, in addition to the usual financial asset classes, illiquid investments.

The Planetarium Alpha Flex sub-fund has been able to generate attractive returns in Euro over the long term, also in comparison with the universe of competitors. The average annual returns from the end of 2011 to the end of 2021 and from the end of 2016 to the end of 2021 were respectively +11.0% and +9.8%.



Founded in 1958, PKB is an international family-owned Swiss banking group specialised in private banking. The bank operates from four Swiss locations, including Zurich, Lugano (headquarters), Geneva and Bellinzona . PKB Group – which includes Cassa Lombarda, a private banking boutique in Italy (established in 1923) – manages assets of approximately CHF 13 billion. PKB has one of the best capital ratios in Switzerland (Core Tier 1 at 29.2% at the bank level).

For more information or to find out how we can support, please visit our website www.pkb.ch.

Contacts

PKB Privatbank SA
+41 91 913 35 35
marketing-com@pkb.ch

Pascal Dubey
+41 76 556 30 85
pascal.dubey@pkb.ch