

Zurich, July 27th 2013

## Third successive top placing in independent performance ranking

For the third time in succession, Helvetic Trust has been ranked in the top 5 most successful investment funds in Switzerland and Germany. Whereas in 2011 we were ranked third in the risk classes "conservative" and "balanced", for the assessment period 2012 the *Abalone Dynamic Trend Allocation Fund* advanced us to second place in the category "Dynamic". In the latest rating for 2013 we have retained this ranking, now however seconded in the "conservative" risk class by another Helvetic Trust investment fund.

Every year the Swiss company *Portfolio Consulting* and the German company *Firstfive* perform a joint performance assessment of around 100 investment funds in Switzerland and Germany. The top ranking is awarded to the five investment funds with the best performance over a 12 month period. The results are published regularly in the Swiss business affairs magazine *BILANZ*.

Helvetic Trust is particularly proud to have been listed for the third time amongst the best five asset managers; and two of these ratings have been top-three rankings.

Vermögensverwaltung	Performance %	Risiko %	Sharpe-Ratio	Vermögensverwaltung	Performance %	Risiko %	Sharpe-Ratio
<b>Risikoklasse: konservativ</b>				<b>Risikoklasse: dynamisch</b>			
1 BHF Trust, Frankfurt am Main Strategie: Ausgewogenes Aktien-/Rentenmandat – international	20,11	3,55	5,65	1 Hauck & Aufhäuser Privatbankiers, Frankfurt am Main Strategie: Aktien Deutschland	35,74	7,88	4,53
2 Helvetic Trust, Zürich Strategie: Global Income	10,27	3,68	2,78	2 Helvetic Trust, Zürich Strategie: High	27,69	7,54	3,67
3 Hauck & Aufhäuser Privatbankiers, Frankfurt am Main Strategie: Konservativ Europa	10,19	2,79	3,63	3 Eniso Partners, Zürich Strategie: Aktien 50% CHF, 30% EUR, 20% USD	23,66	7,09	3,33
4 Berlin & Co., Frankfurt am Main Strategie: II – ausgewogen	9,48	3,50	2,70	4 M.M. Warburg (Schweiz), Zürich Strategie: Aggressives Wachstum	20,89	5,76	3,62
5 Cape Capital, Zürich Strategie: Fixed Income	9,07	3,18	2,84	5 Berenberg Bank (Schweiz), Zürich Strategie: Aktien	16,95	6,41	2,64

Source: BILANZ 15-16/2013 as of 26 July 2013