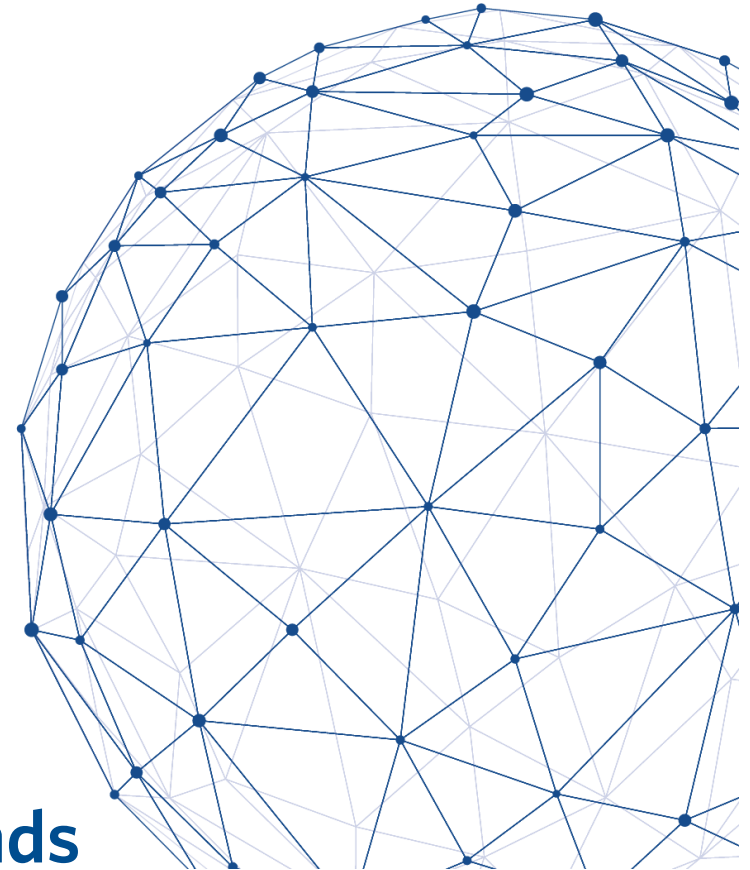


# Scope Investment Awards 2023

## Kategorien, Methodik & Nominierung





# Scope Investment Awards - Fonds

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## Übersicht Fondskategorien

### Aktien

- Deutschland
- Europa
- Nordamerika
- Welt
- Emerging Markets

### Renten

- Globale Währungen
- EUR
- EUR Corporate HY
- USD Corporate HY
- Emerging Markets HC

### Mischfonds

- Global Flexibel
- Global Konservativ

### Sonderkategorien

- Rohstofffonds
- Fund Innovations

## Anforderungen

- Scope Fondsrating, Mindestvolumen, kein Großanlegerfonds, kein „Soft-“ oder „Hard-Close“

## Vorgehensweise

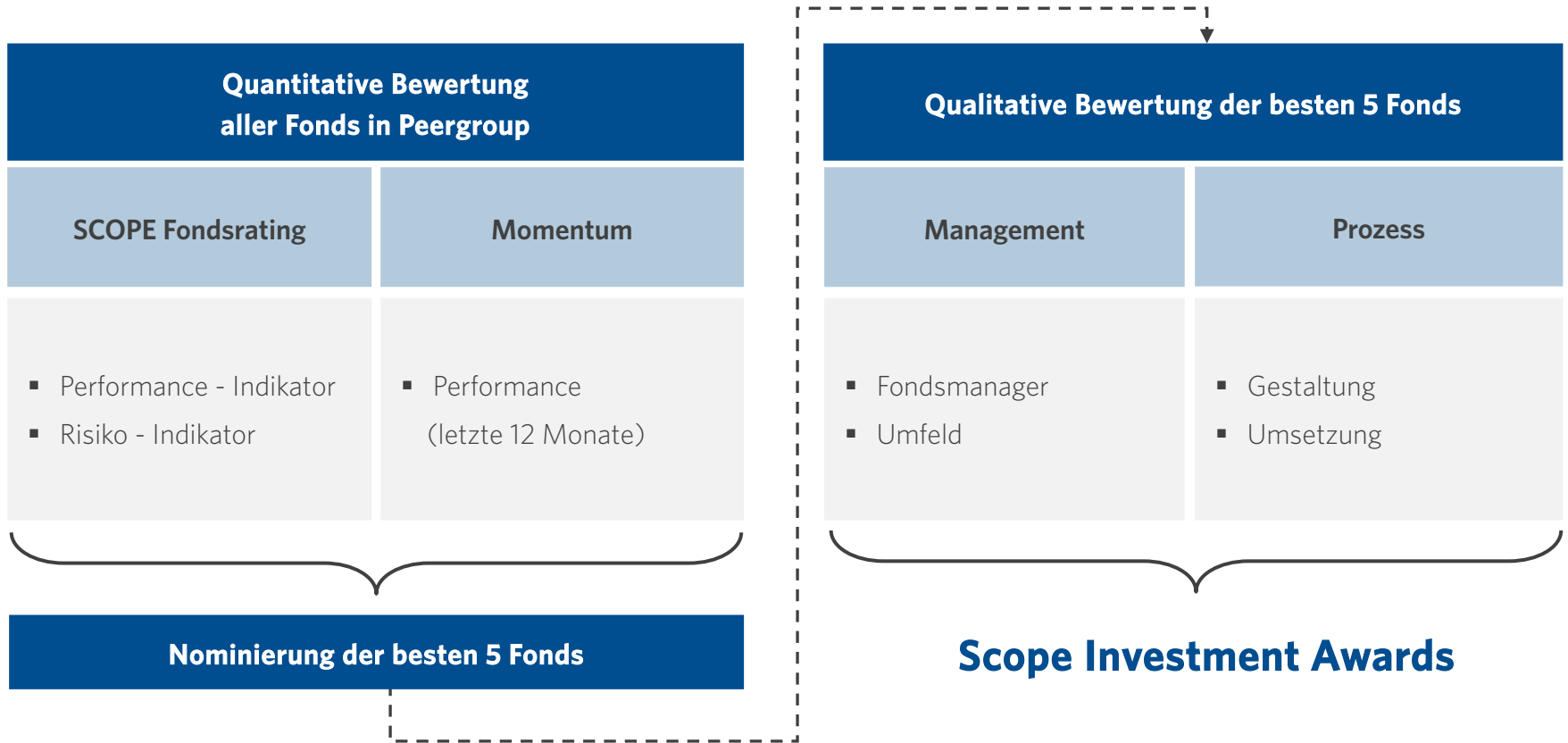
### Bewertungsebenen:

- **Quantitativ:** SCOPE Fondsrating-Punktzahl und Performance (Momentum) der letzten zwölf Monate
- **Qualitativ:** Bewertung der *Top Five* Fonds unter Verwendung eines Fragebogens und Kriterienkatalogs

## Gewichtung

- Feste Gewichtungen für die quantitativen und qualitativen Kriterien

## Bewertungsverfahren - Fonds



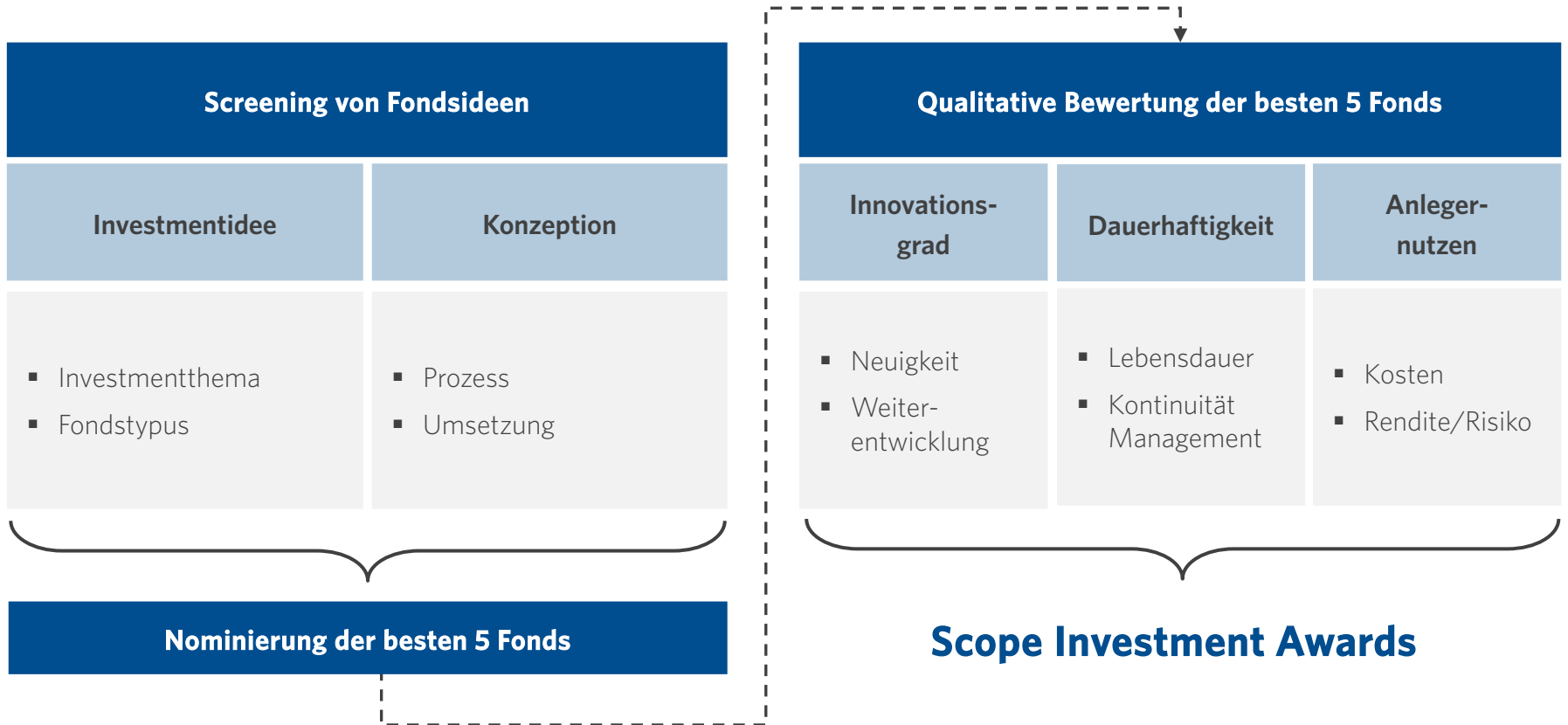
## Quantitative Bewertung

SCOPE Fonds Ratingpunktzahl	
Performancebeitrag (70%)	Risikominderung (30%)
<ul style="list-style-type: none"> <li>▪ Relative Performance 35%</li> <li>▪ Langfr. Ertragskraft 25%</li> <li>▪ Stabilität 40%</li> </ul>	<ul style="list-style-type: none"> <li>▪ Timing 25%</li> <li>▪ Verlust 60%</li> <li>▪ Verhalten 15%</li> </ul>

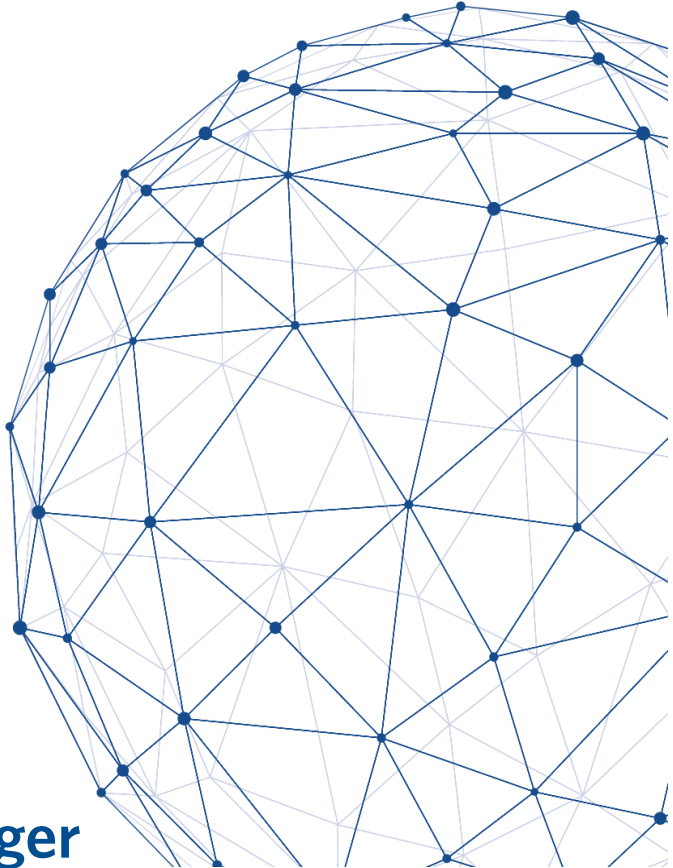
## Qualitative Bewertung



## Bewertungsverfahren „Fund Innovations“







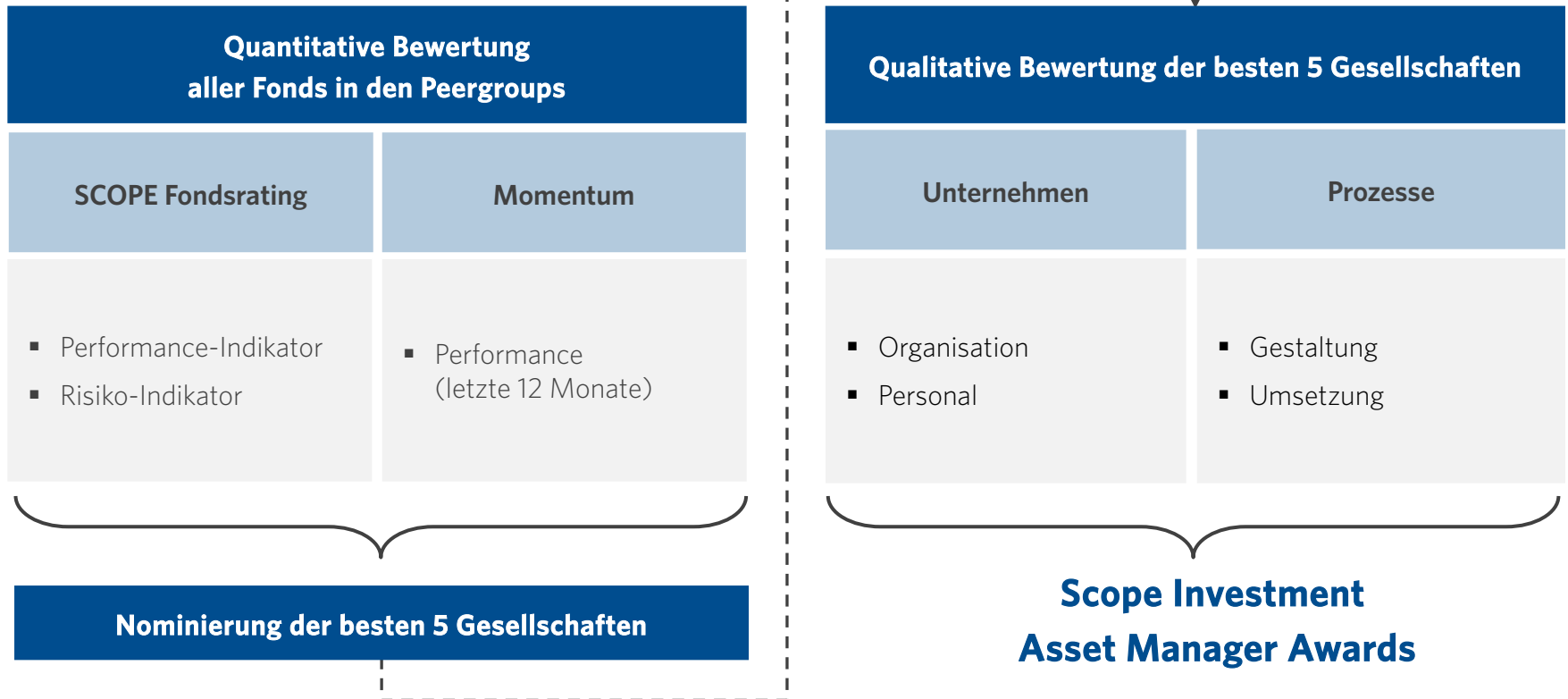
# Scope Investment Awards - Asset Manager

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## Übersicht – Asset Manager Kategorien



## Bewertungsverfahren\*



\*Kategorien: Universal-, Spezialanbieter, Aktien- und Rentenfonds. Sonstige Kategorien basieren auf diesem Konzept unter Berücksichtigung assetklassenspezifischer Kriterien.



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