



Scope  
Analysis

# Scope Investment Awards 2021

Kategorien, Methodik & Nominierung





- I. **Scope Investment Awards - Fonds**
- II. **Scope Investment Awards - Asset Manager**

### Übersicht Fondskategorien

#### Aktien

- Nordamerika
- Europa
- Welt
- Emerging Markets
- Deutschland

#### Renten

- Globale Währungen
- Emerging Markets LC
- Euro Corporate IG
- EUR Corporate HY
- EUR

#### Mischfonds

- Global Flexibel

#### Sonderkategorie

- Fund Innovations



# Scope Investment Awards 2021

Methodik - Fondskategorien

## Anforderungen

- **SCOPE Fondsrating, Mindestvolumen, kein Großanlegerfonds, kein „Soft-“ oder „Hard-Closing“**

## Vorgehensweise

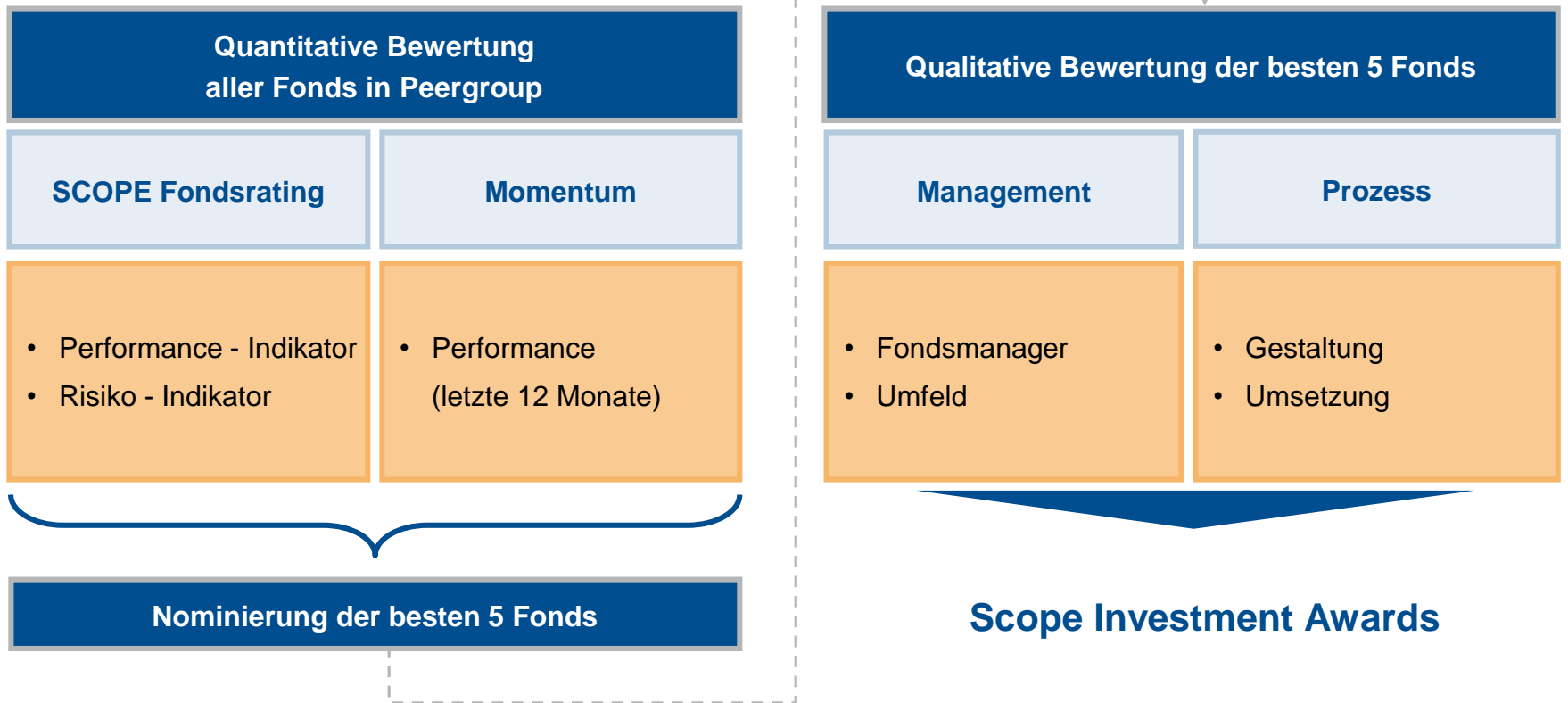
### Zwei Bewertungsebenen:

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

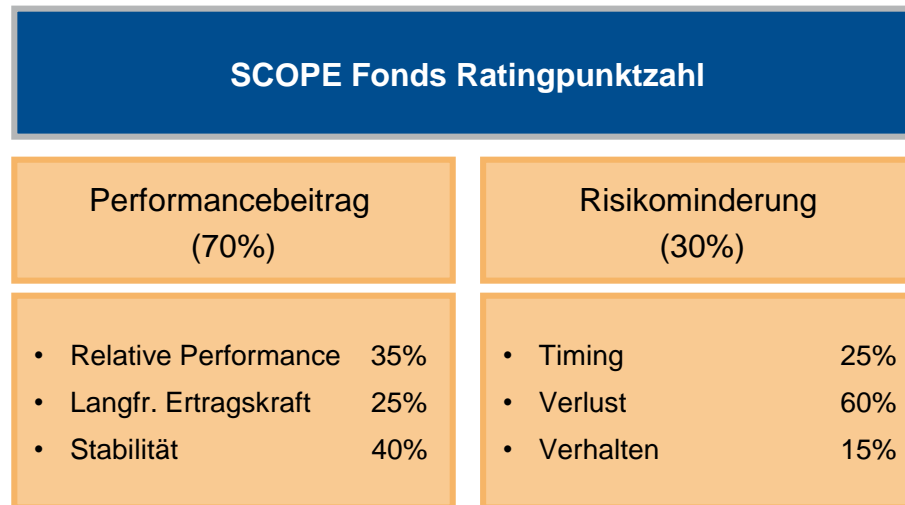
## Gewichtung

- **Feste Gewichtungen für die quantitativen und qualitativen Kriterien**

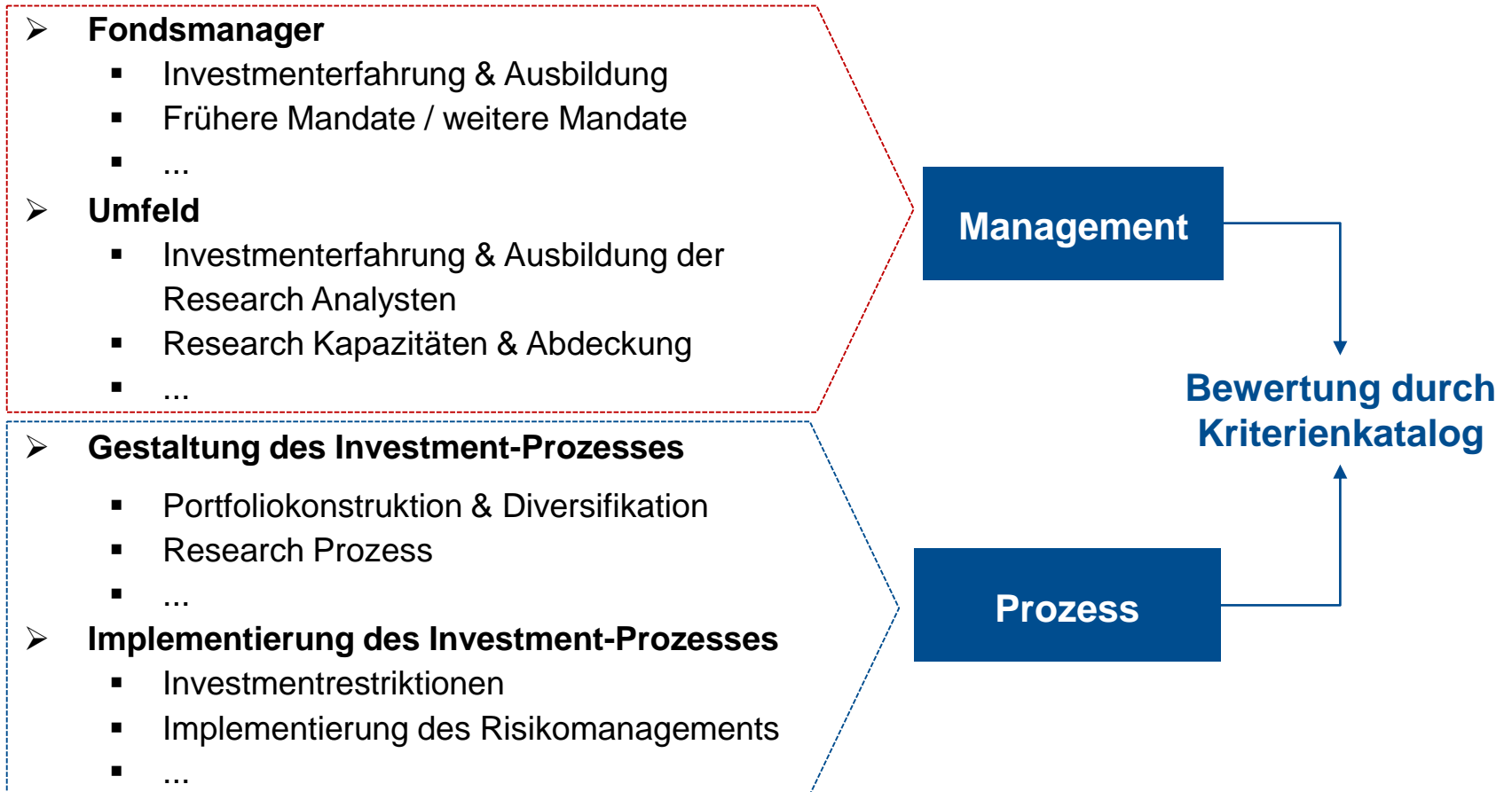
### Bewertungsverfahren - Fonds



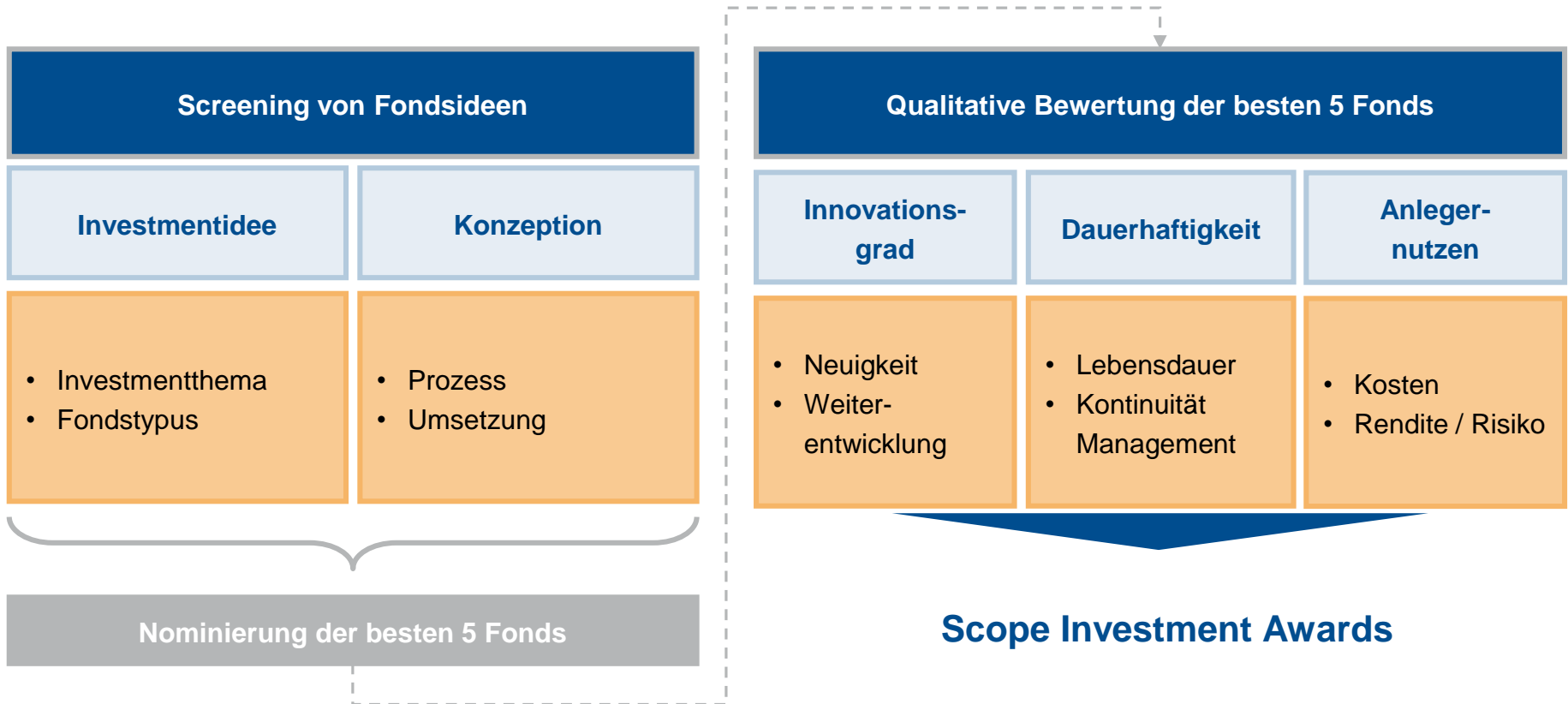
### Quantitative Bewertung



### Qualitative Bewertung



### Bewertungsverfahren „Fund Innovations“







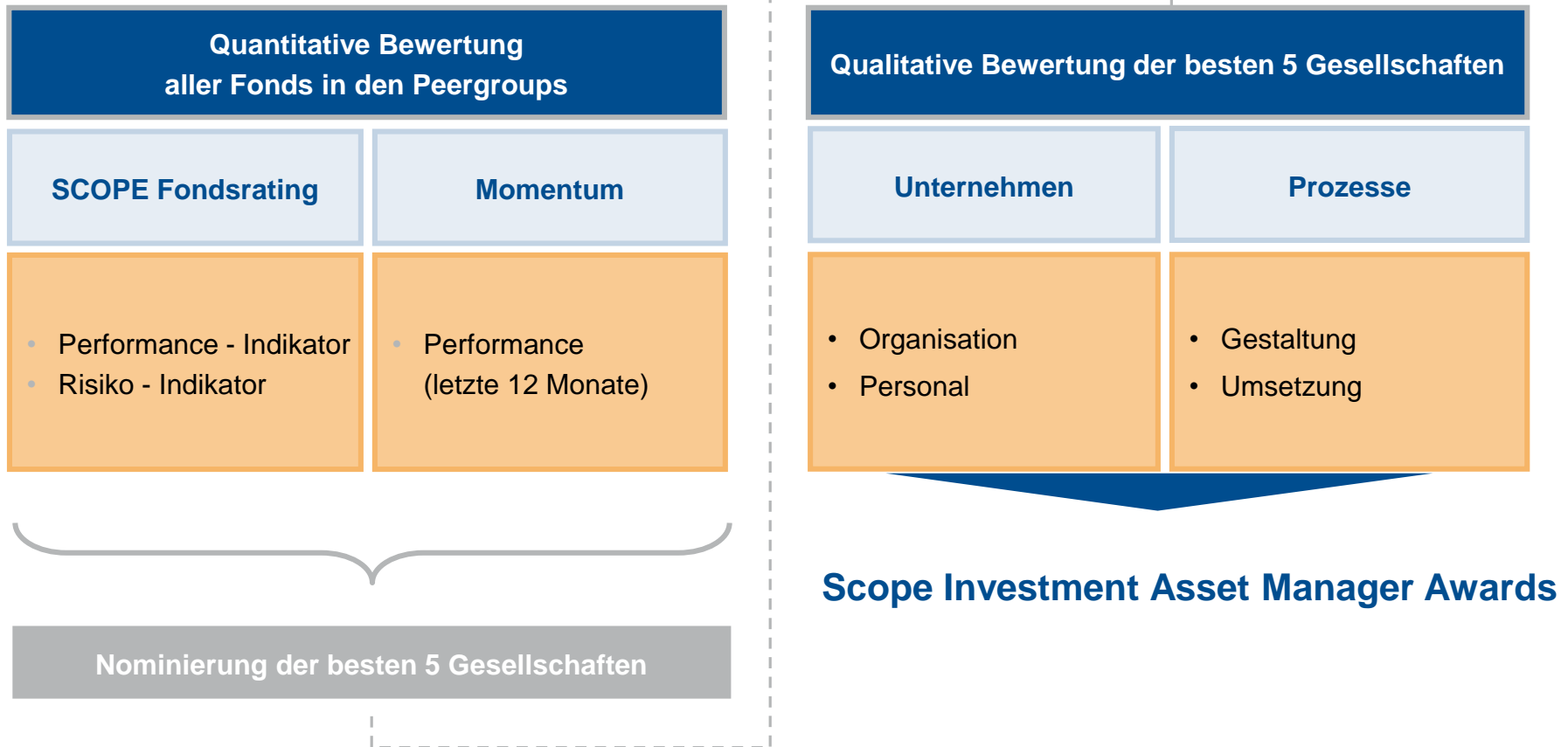
## Inhalte

- I. Scope Investment Awards - Fonds
- II. Scope Investment Awards - Asset Manager**

### Übersicht – Asset Manager Kategorien



### Bewertungsverfahren\*



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



## Standorte

Sieben Standorte in ganz Europa



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Portraits of the operating companies

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