



Scope
Analysis

Scope Investment Awards 2019

Kategorien, Methodik & Nominierung





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

Übersicht Fondskategorien

Aktien

- Nordamerika
- Europa
- Welt
- Emerging Markets
- Deutschland
- Österreich
- Schweiz

Renten

- Globale Währungen
- Euro Corporate IG
- EUR Corporate HY (neu)
- EUR
- CHF

Mischfonds

- Global Flexibel

Sonderkategorie

- Fund Innovations



Scope Investment Awards 2019

Methodik - Fondskategorien

Anforderungen

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

Vorgehensweise

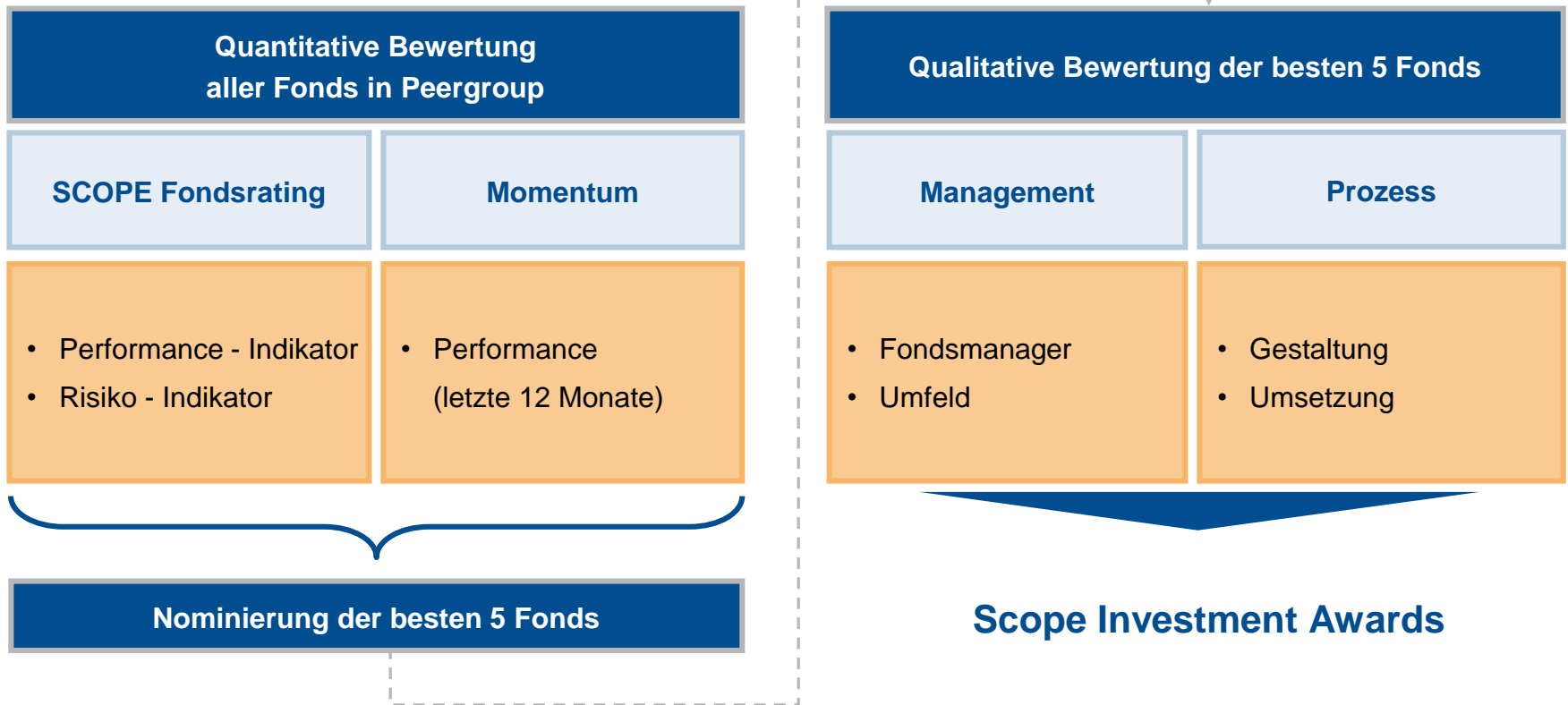
Zwei Bewertungsebenen:

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

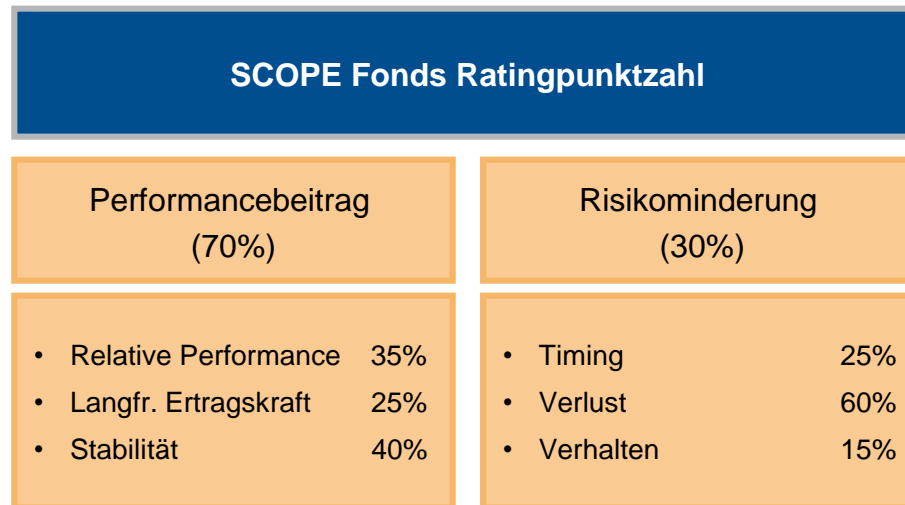
Gewichtung

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

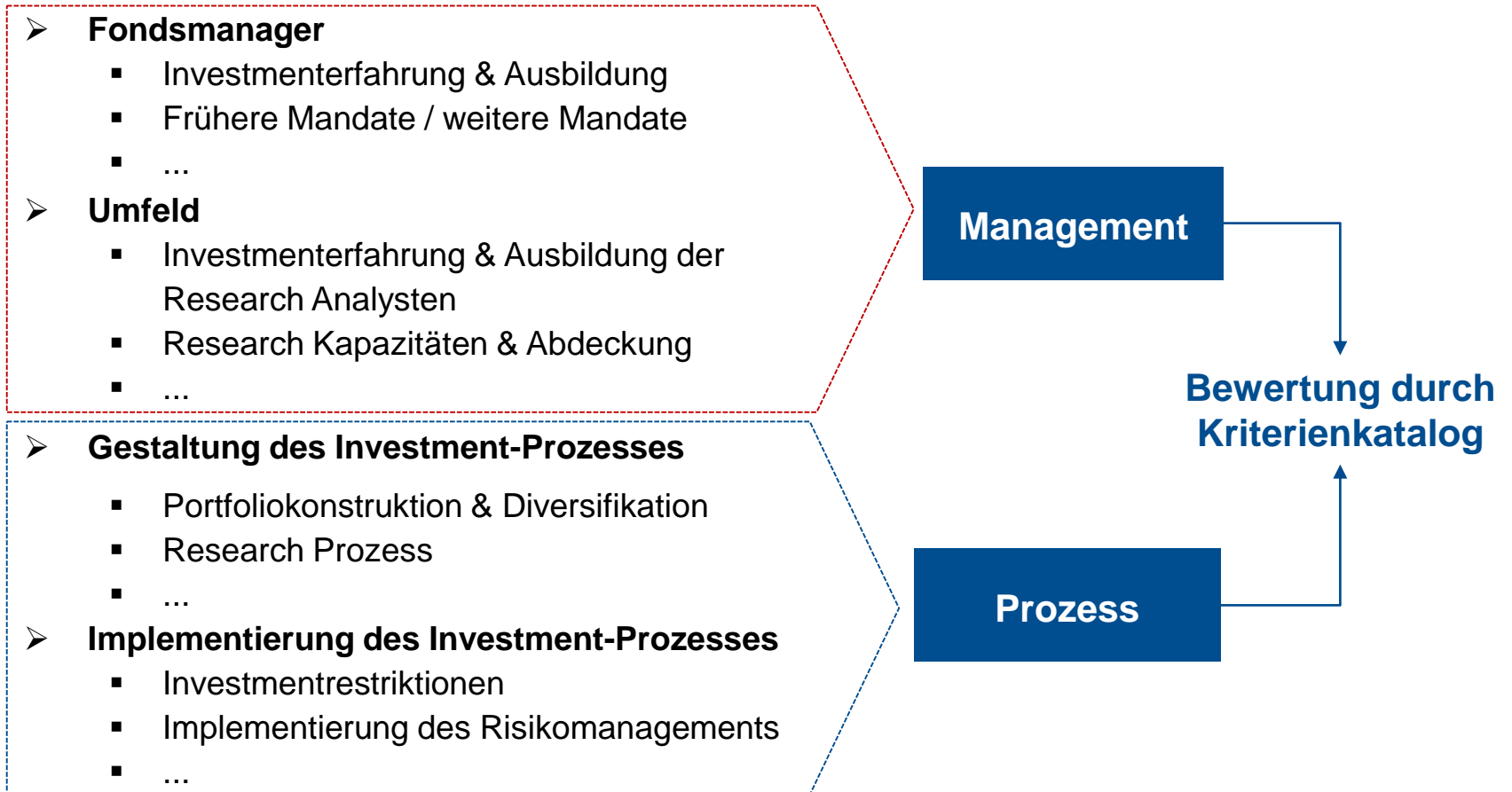
Bewertungsverfahren - Fonds



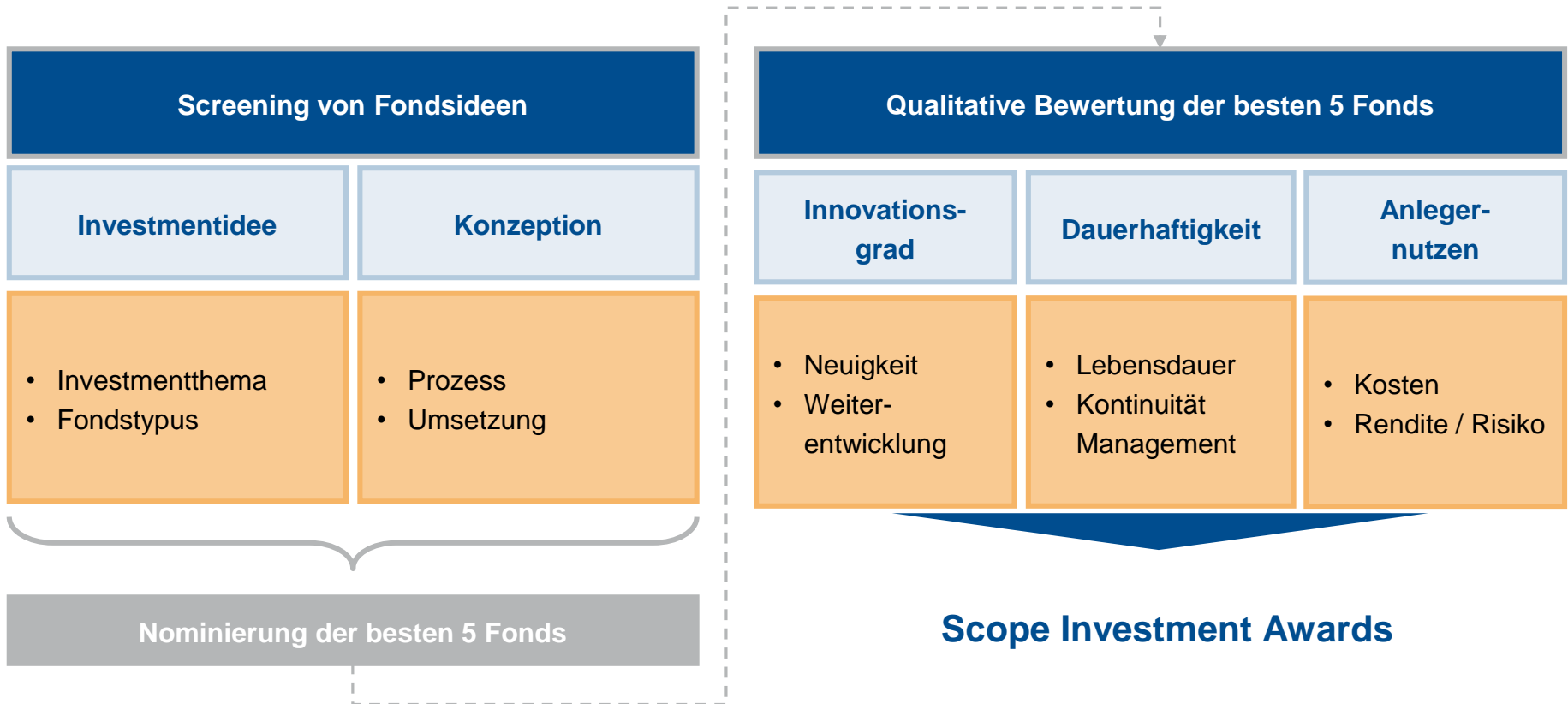
Quantitative Bewertung



Qualitative Bewertung



Bewertungsverfahren „Fund Innovations“





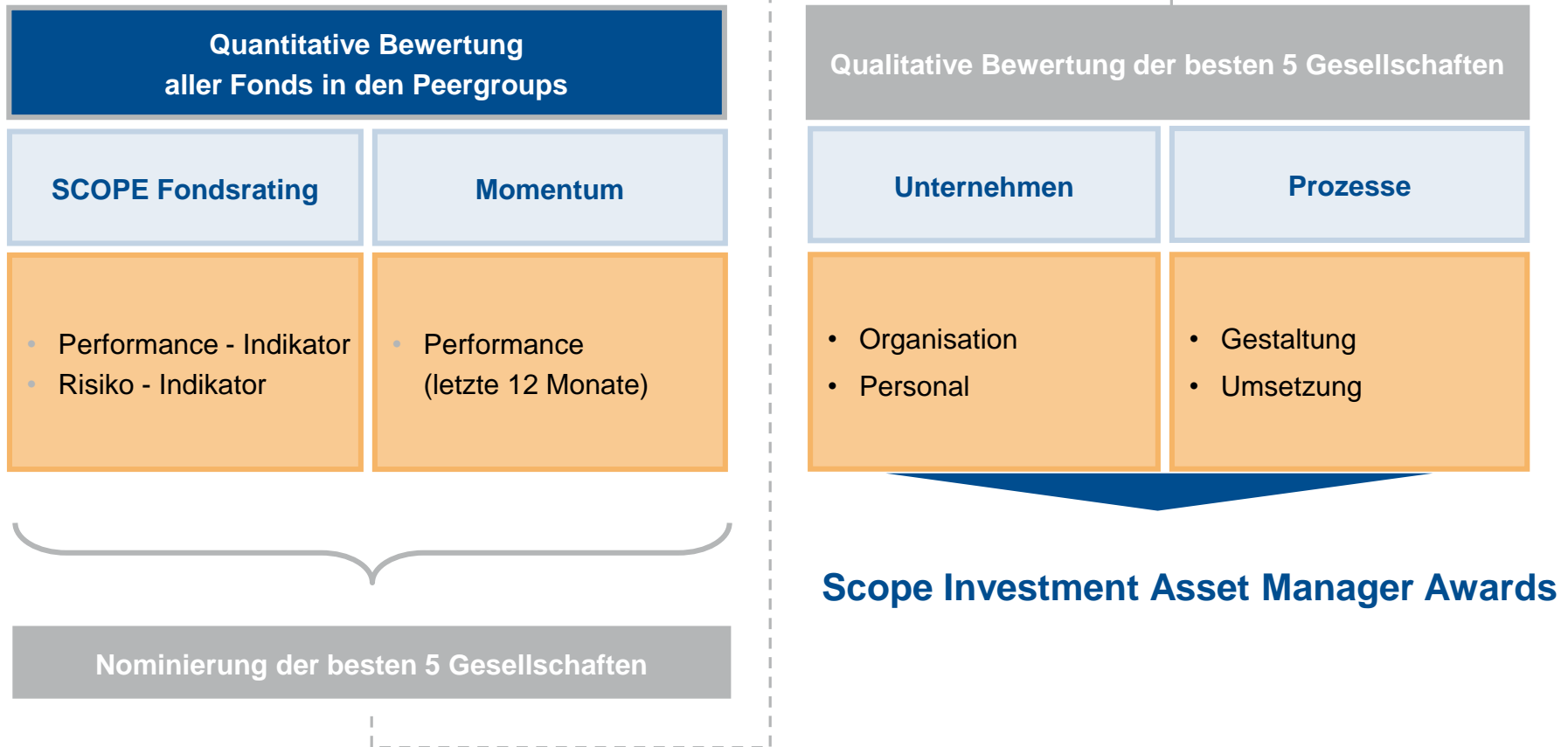
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- I. Scope Investment Awards - Fonds
- II. Scope Investment Awards - Asset Manager**

Übersicht – Asset Manager Kategorien



Bewertungsverfahren*



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



Standorte

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Portraits of the operating companies

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